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Travel Activities & Motivation Survey

Wine and Cuisine Profile Report

TAMS
Travel Attitudes &
Motivation Survey

April, 2001

Lang

Travel Activities & Motivation Survey

Prepared by:

Lang Research Inc.

on behalf of

Atlantic Tourism Partnership

Canadian Tourism Commission

Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Tourism, Culture & Recreation

Ontario Tourism Marketing Partnership

Parks Canada

Saskatchewan Tourism Authority

Tourism B.C.

Tourism Toronto

Yukon Government Department of Tourism

Interest In wine and cuisine Vacation Activities

- Key Findings -

Canadians with an interest in vacation activities associated with cuisine (e.g., fine dining) and wine (e.g., tours of wineries, wine regions) were more likely to be from Quebec, Ontario, Alberta and British Columbia than from the other provinces. In the United States, those from the Pacific Region (e.g., California, Oregon, Washington, Hawaii) and the South Atlantic (Florida, Georgia, North and South Carolina) and the Middle Atlantic (e.g., Pennsylvania, New York, New Jersey) were most likely to be interested in wine and cuisine vacation activities.

In both Canada and the U.S., Affluent Mature and Senior Couples were the most likely to be interested in wine and cuisine. This is the prime target market for such activity. Affluent Young Singles, Affluent Couples, Affluent Families and Affluent Mature Couples also exhibit an above average interest in wine and cuisine and should be considered secondary markets for promotional activities. Clearly affluence is an important predictor of interest in such activities. Overall, these five segments represent 24.5 % of the Canadian adult population (18 plus) and 27.3 % of the United States adult population.

Those who exhibited an interest in vacation activities associated with wine and cuisine were considerably more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders), personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote cuisine and wine should emphasize the cultural, entertainment and romantic images of the destination and be specifically targeted at affluent couples, and to a certain extent, affluent singles. There should be a hedonistic quality to such promotions.

Participation in cultural and entertainment activities while on a trip is more closely associated with an interest in wine and cuisine than participation in outdoor activities while traveling. This association is especially strong for those who shopped or dined, attended high art performances (e.g., ballet, opera), attended concerts, carnivals or fairs, visited botanical gardens or visited casinos. These cultural and entertainment activities should be promoted in wine and cuisine vacation packages.

Those who exhibit an interest in wine and cuisine were also more likely to have participated in outdoor activities while on a trip and especially water sports (e.g., sailing, scuba diving), fitness activities, swimming and sunbathing, team sports, natural sightseeing (e.g., viewing wildflower and flora, going on picnics in park settings) and golfing. These sorts of activities are more likely to be undertaken by the more affluent traveler, and especially affluent couples and singles.

Those interested in wine and cuisine are more likely to consult a larger number of information sources when planning their vacations, especially newspapers and magazines, travel agents, travel information offices, travel guides and the Internet.

Intérêt des consommateurs pour les destinations vacances axées sur la gastronomie et les vins

Conclusions principales -

Les Canadiens qui présentaient un certain intérêt pour les destinations vacances axées sur la gastronomie (la fine cuisine et les vins par exemple, la tournée des vignobles et des régions vinicoles) provenaient essentiellement du Québec, de l'Ontario, de l'Alberta et de la Colombie-Britannique. Aux États-Unis, ce sont surtout les habitants de la région du Pacifique (par exemple, la Californie, l'Oregon, Washington et Hawaii), de l'Atlantique Sud (la Floride, la Georgie, la Caroline du Nord et la Caroline du Sud) et de l'Atlantique centre (par exemple, la Pennsylvanie, les états de New York et du New Jersey) qui démontraient le plus d'intérêt pour ce type d'activités.

Tant au Canada qu'aux États-Unis, ce sont surtout les couples d'âge mûr et les couples âgés bien nantis qui démontraient le plus d'intérêt pour la fine cuisine et les vins. Ces gens constituent la clientèle cible des agences de publicité chargées de promouvoir ce type d'activités. Les jeunes célibataires, les couples, les familles et les couples d'âge mûr bien nantis démontraient également un intérêt marqué pour la fine cuisine et les vins, ce qui signifie que les agences de publicité devraient en tenir compte et les considérer comme des marchés secondaires lorsqu'il s'agit de promouvoir ce type d'activités. Il est évident que la richesse est un indice important concernant l'intérêt manifesté pour ce type d'activités. Ces cinq segments représentent au total 24,5 % de la population adulte canadienne (âgée de18 ans et plus) et 27,3 % de la population adulte américaine.

Les personnes qui présentaient un certain intérêt pour les destinations vacances axées sur la gastronomie et les vins étaient plus portées à choisir des endroits où ils pouvaient assouvir leur soif de découverte (par exemple, visites de lieux historiques et de sites naturels), s'offrir du bon temps (par exemple, faire la grande vie, visiter un casino, profiter de la vie nocturne d'un grand centre urbain), vivre des moments romantiques et prendre le temps de relaxer (par exemple, s'offrir des vacances dans des endroits intimes et romantiques, prendre le temps de relaxer et de récupérer). Le matériel publicitaire utilisé pour la promotion des destinations axées sur la gastronomie et les vins devrait cibler les couples bien nantis, et peut-être même sur les célibataires fortunés, ce qui signifie mettre l'accent sur la culture, les divertissements et le côté romantique de ces destinations. En fait, ces campagnes publicitaires devraient avoir un aspect hédoniste.

Pendant leurs vacances, les personnes qui présentaient un certain intérêt pour les destinations vacances axées sur la gastronomie et les vins étaient plus portées à prendre part à des activités culturelles et à assister à des spectacles qu'à pratiquer des activités extérieures. Cette corrélation était particulièrement marquée chez les personnes qui fréquentaient les boutiques et les restaurants, assistaient à des spectacles de grand art (par exemple, le ballet, l'opéra), à des concerts, à des carnavals ou à des foires, ou encore visitaient des jardins botaniques ou des casinos. Les forfaits de vacances liés à la gastronomie et aux vins devraient promouvoir ce type d'activités culturelles et d'attractions.

Les personnes qui présentaient un certain intérêt pour les destinations vacances axées sur la gastronomie et les vins étaient également plus enclines à participer à des activités extérieures pendant leurs vacances, plus particulièrement les sports nautiques (par exemple, la voile, la plongée), les activités de mise en forme, la nage, les bains de soleil, les sports d'équipe, la visite de lieux naturels (par exemple, l'observation de la faune et de la flore, les pique-niques dans des parcs) et le golf. Ces types d'activités étaient surtout pratiqués par les voyageurs les plus fortunés, plus particulièrement les couples et les célibataires.

Les personnes démontrant un certain intérêt pour la gastronomie et les vins consultaient un plus grand nombre de sources d'information lors de la planification de leurs vacances, plus particulièrement les journaux, les magazines, les agents de voyage, les centres d'information touristique, les guides et l'Internet.

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Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities & Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators and provides a rich anc authoritative database by which to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mail-back survey. The survey was conducted in Canada and the United States between September 27, 1999 to April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. Persons participating in the telephone survey who had traveled in the past two years or expressed interest in travel in the next two years were asked to complete a mail-back questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in travel activities associated with cuisine (e.g., fine dining) and wine (e.g., tours of wineries). The database was used to identify sectors of the market that exhibit high interest in such activities. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in wine and cuisine vacation activities. This report also provides an overall market potential of each segment of the market. This will identify those segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's/Ontario's wine and cuisine related vacation products.

Wine & Cuisine Interest Index

Construction of the Index

The TAMS Mailback Survey contained six items specifically associated with wine and cuisine which were use to construct an overall Wine and Cuisine Interest Index. These were:

- Having pursued the following vacation experience during the past two years:
  "To experience the good life with fine cuisine, good wine, being pampered"
- Having participated in the following cultural and entertainment activities during the past two years:
  - Local outdoor cafes
  - Restaurant dining – regional or local cooking
  - Restaurant dining – internationally acclaimed restaurants
  - Touring a region's wineries where you stay one or more night
  - Going to wineries for a day visit and tastings
- Indicating that the following new attraction would make them "a lot more interested" in taking a trip to Ontario:
  - A wine region such as the Napa Valley or Cote d' Or in France.

The responses to these six items were factor analysed to construct the overall Wine and Cuisine Interest Index. Factor scores were computed and respondents were classified into three groups:

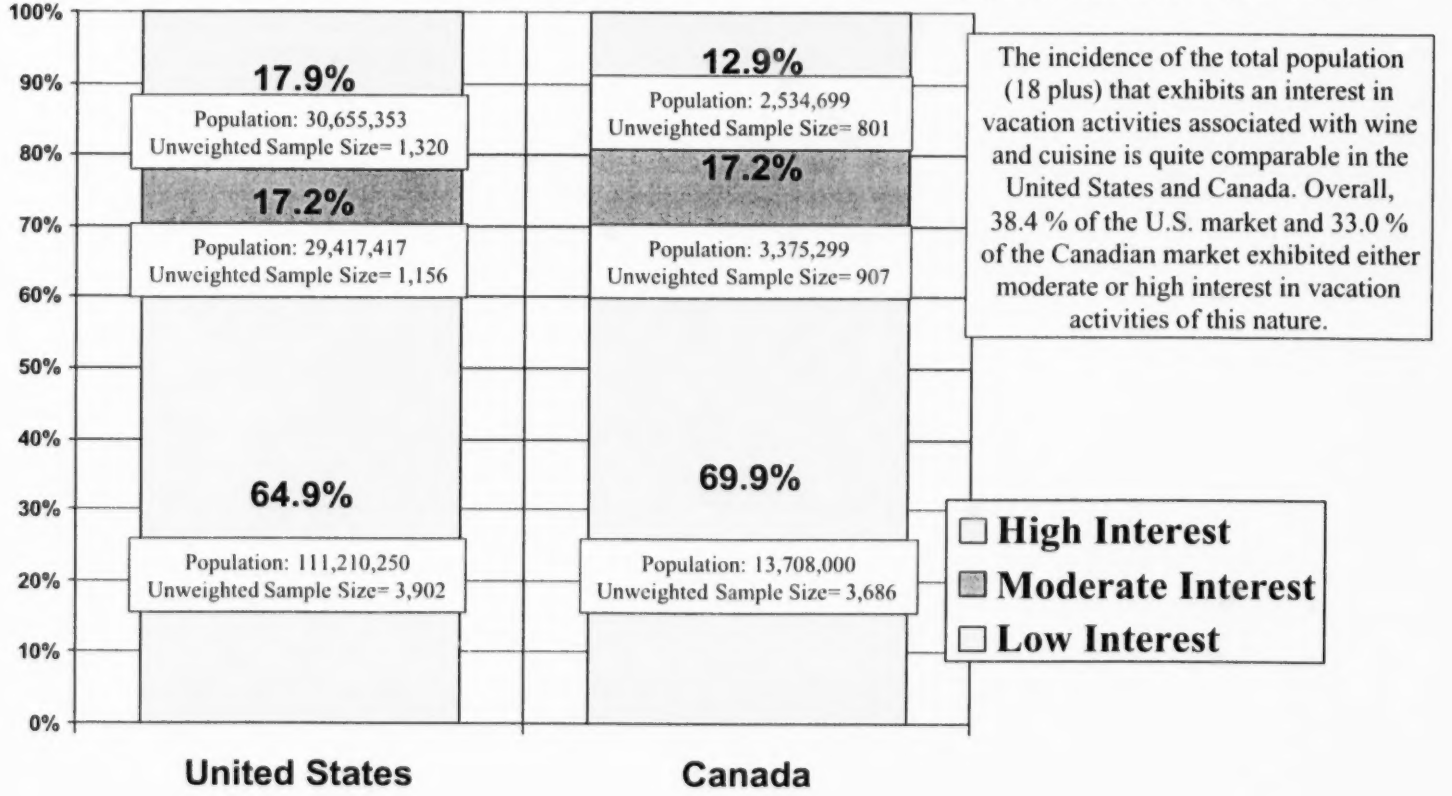
- Low Interest (Below average participation or interest in the six wine and cuisine related activities)
- Moderate Interest (Average participation and interest in the six wine and cuisine related activities)
- High Interest (Significantly above average participation and interest in the six wine and cuisine related activities)

Interest in Wine and Cuisine

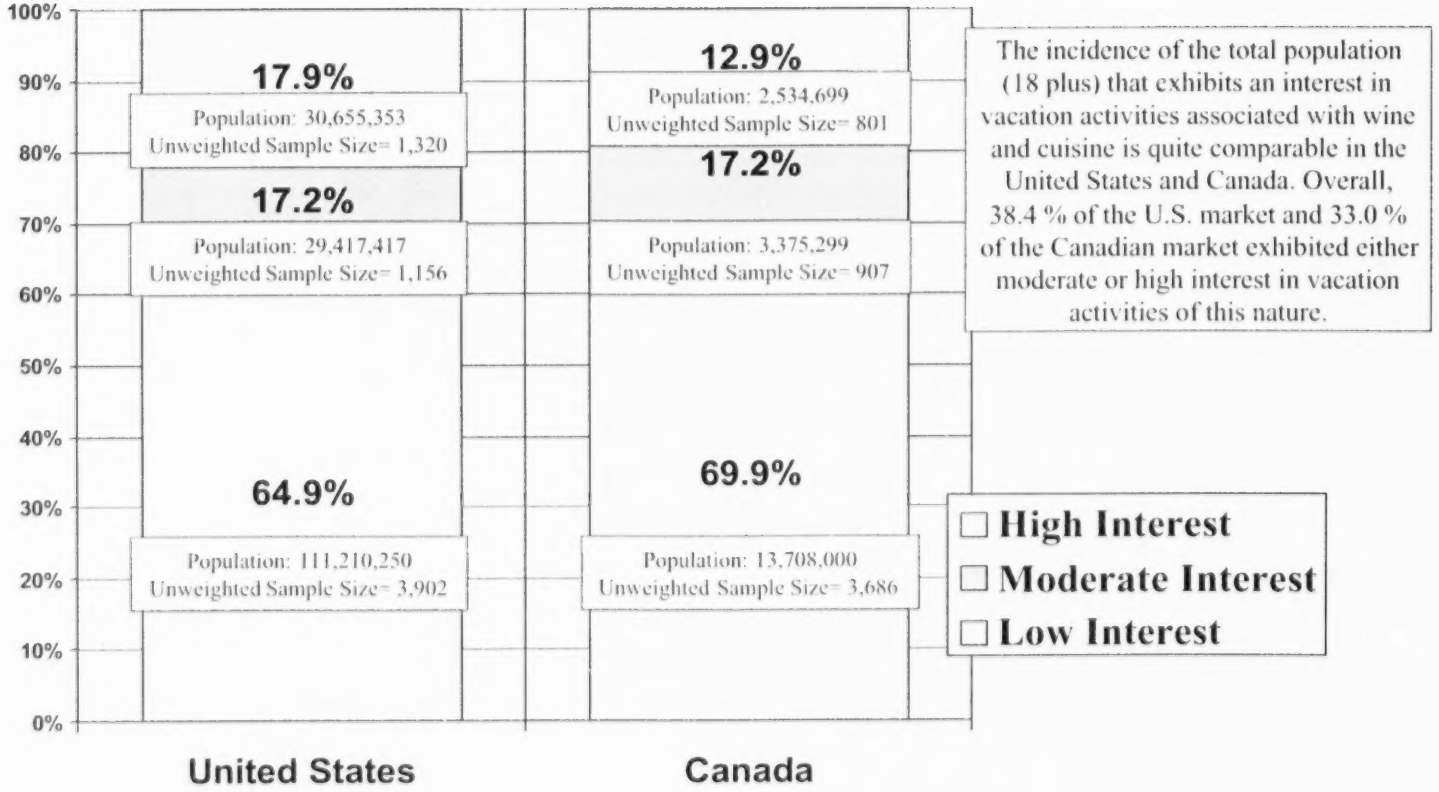
Canada versus United States

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The incidence of the total population (18 plus) that exhibits an interest in vacation activities associated with wine and cuisine is quite comparable in the United States and Canada. Overall, 38.4 % of the U.S. market and 33.0 % of the Canadian market exhibited either moderate or high interest in vacation activities of this nature.



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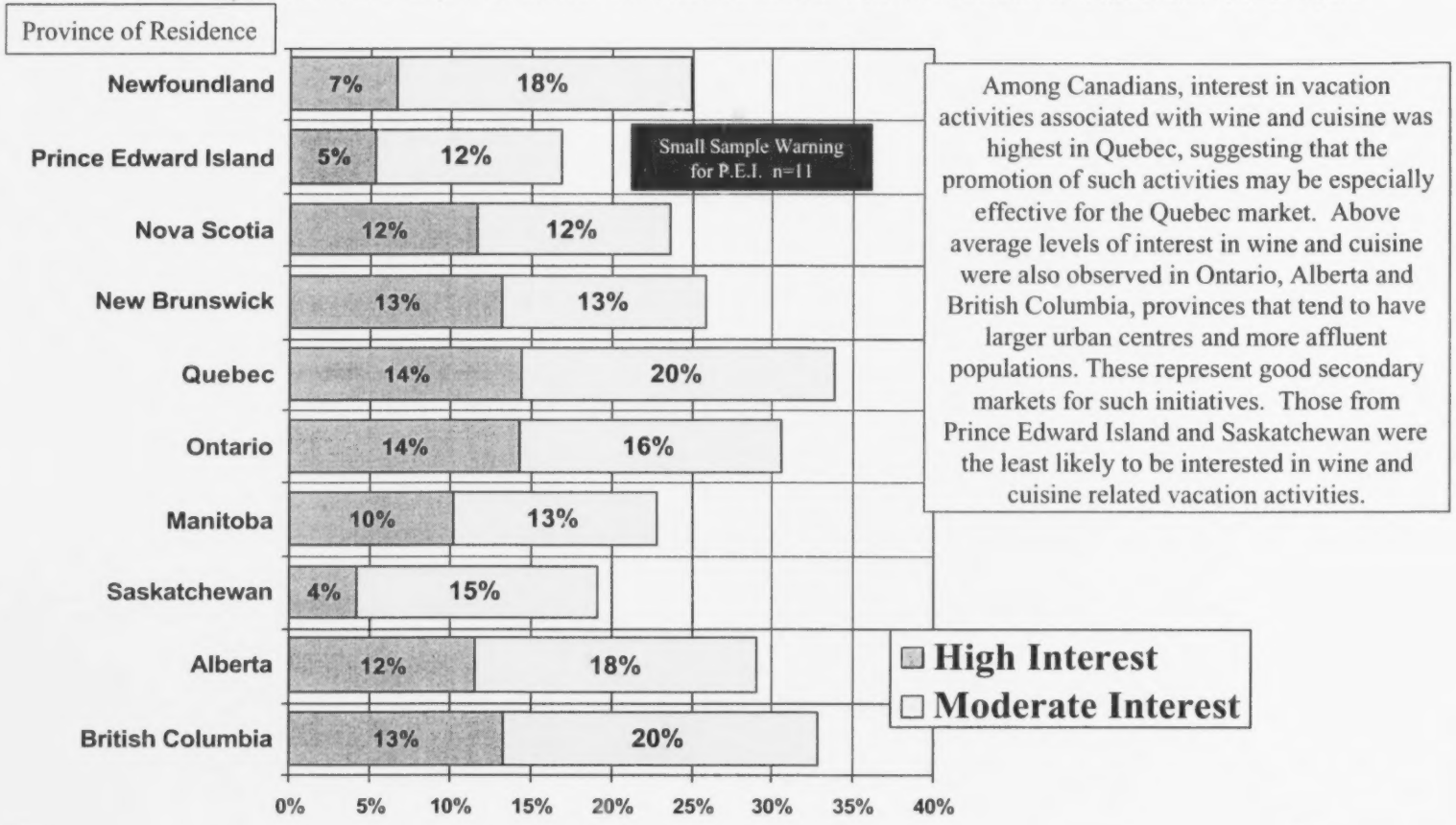
Interest in Wine and Cuisine: Based on Prior Travel Activities & Future Interest

Canada:By Province

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years

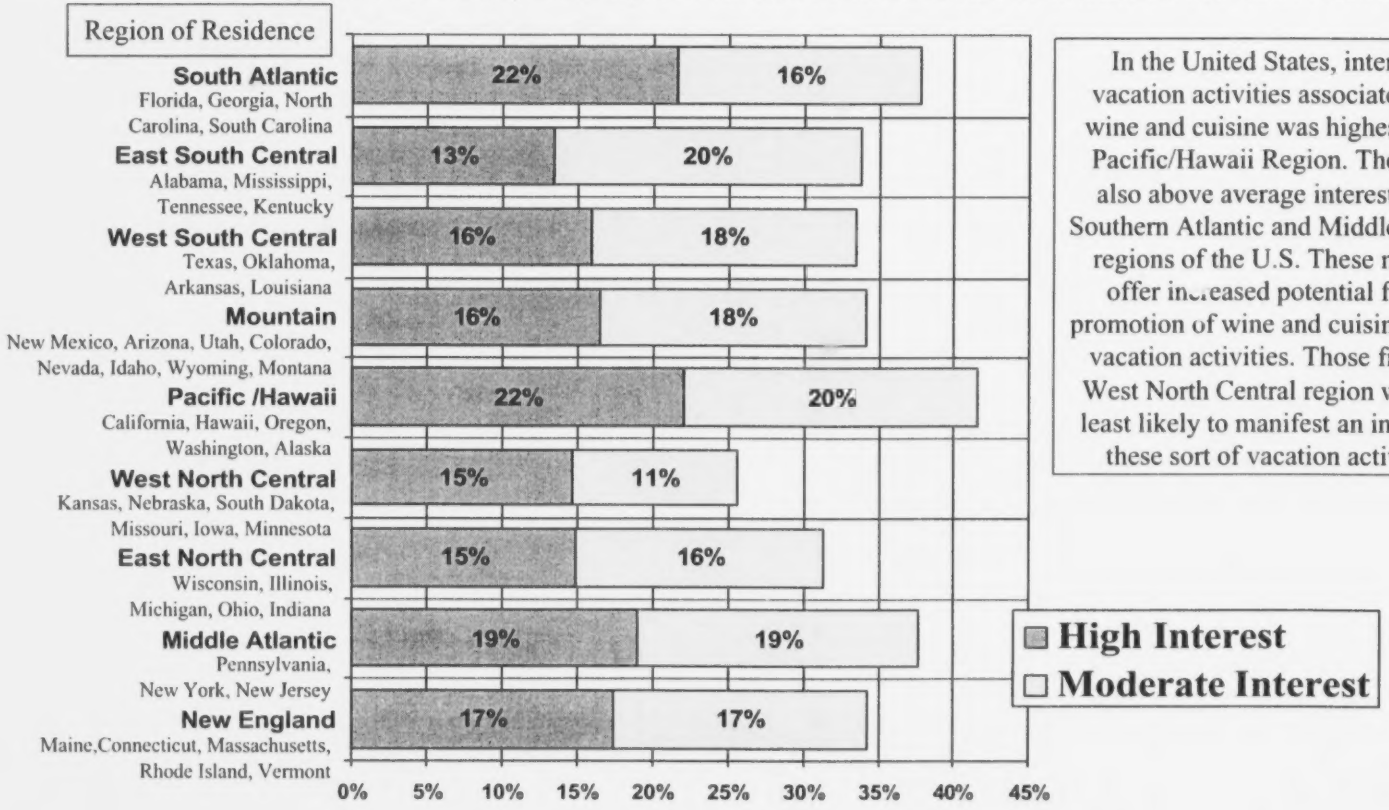


Among Canadians, interest in vacation activities associated with wine and cuisine was highest in Quebec, suggesting that the promotion of such activities may be especially effective for the Quebec market. Above average levels of interest in wine and cuisine were also observed in Ontario, Alberta and British Columbia, provinces that tend to have larger urban centres and more affluent populations. These represent good secondary markets for such initiatives. Those from Prince Edward Island and Saskatchewan were the least likely to be interested in wine and cuisine related vacation activities.

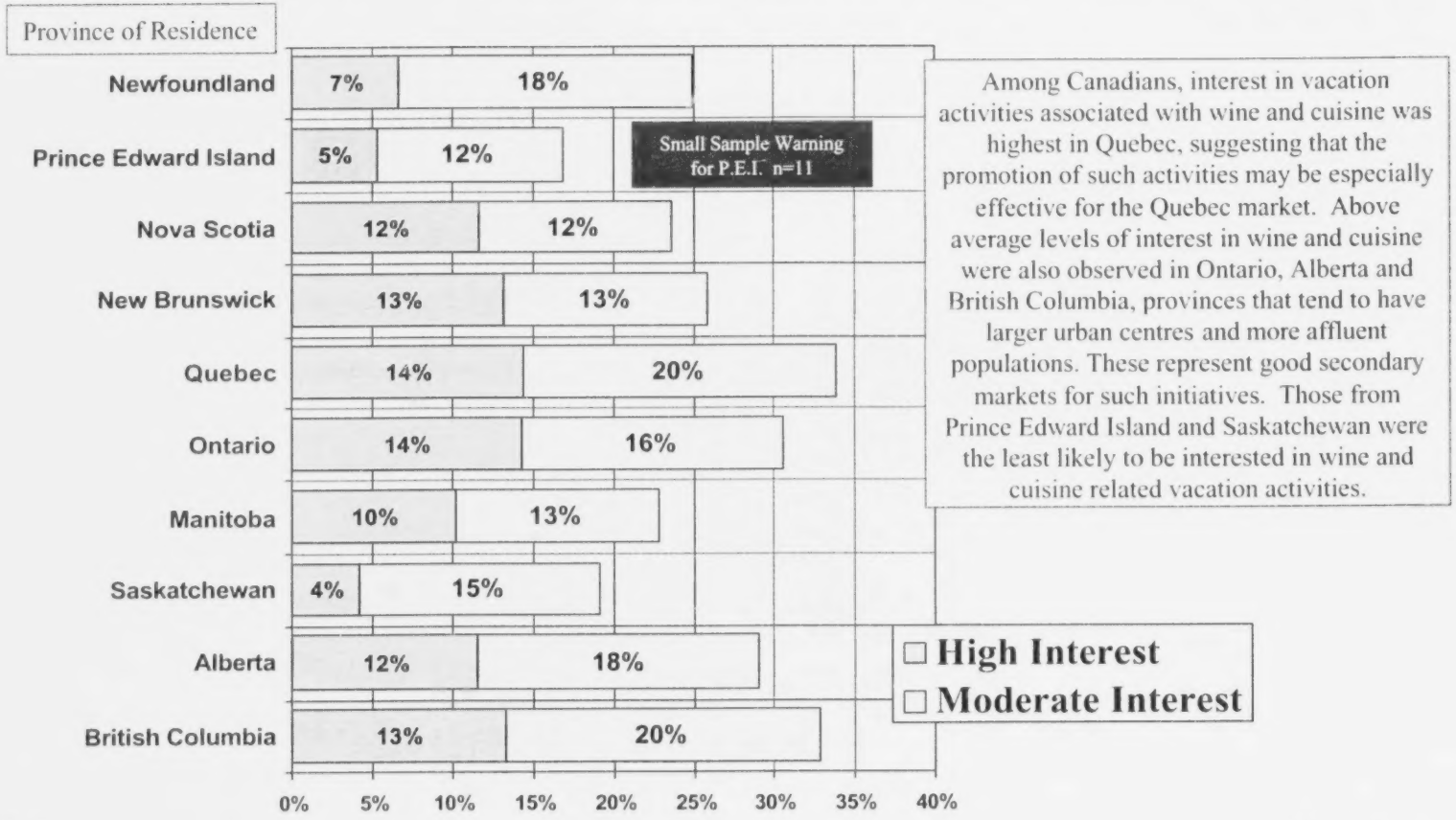
Interest in Wine and Cuisine: Based on Prior Travel Activities & Future Interest

United States:By Region

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



In the United States, interest in vacation activities associated with wine and cuisine was highest in the Pacific/Hawaii Region. There was also above average interest in the Southern Atlantic and Middle Atlantic regions of the U.S. These markets offer increased potential for the promotion of wine and cuisine related vacation activities. Those from the West North Central region were the least likely to manifest an interest in these sort of vacation activities.



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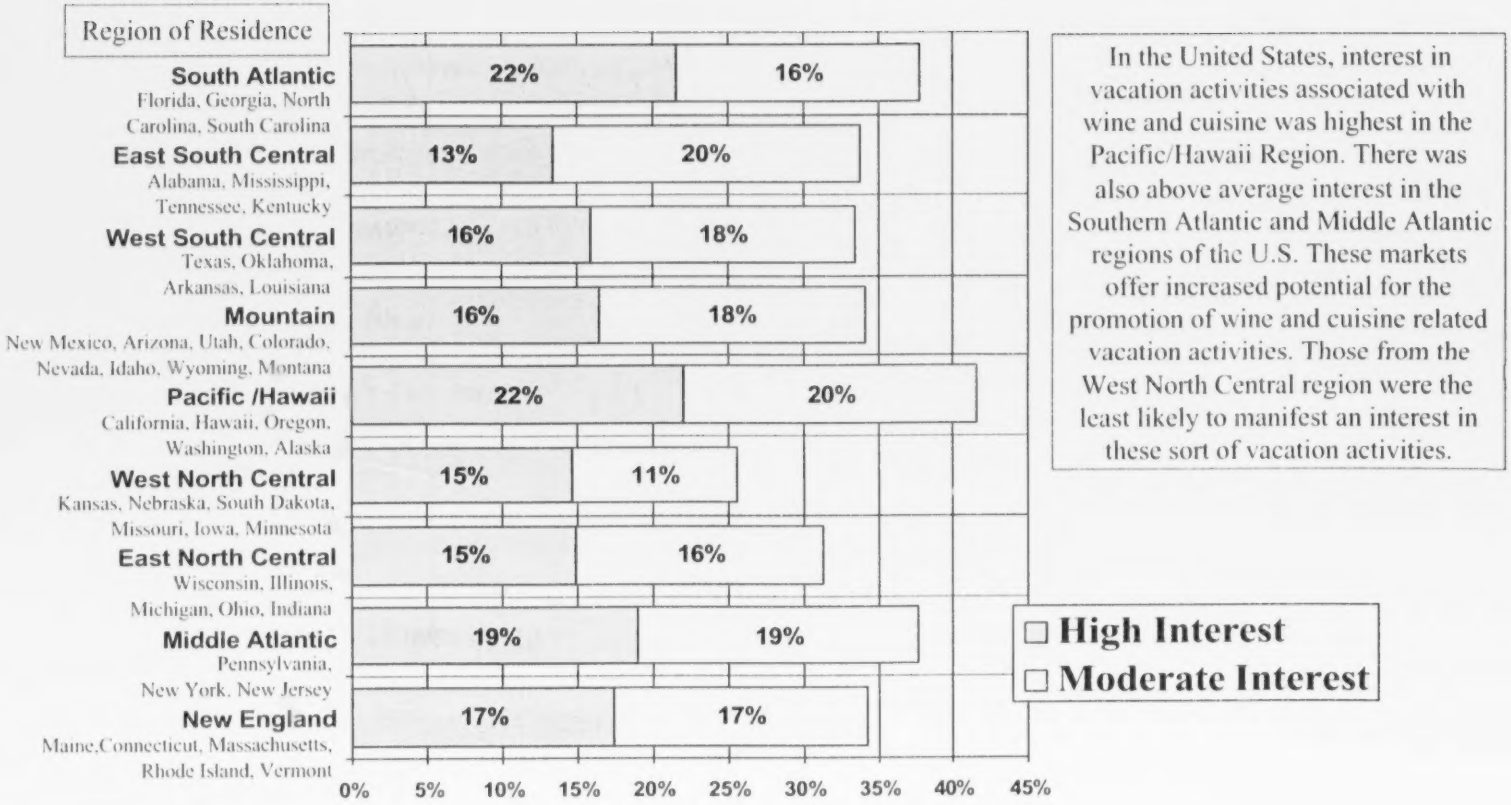

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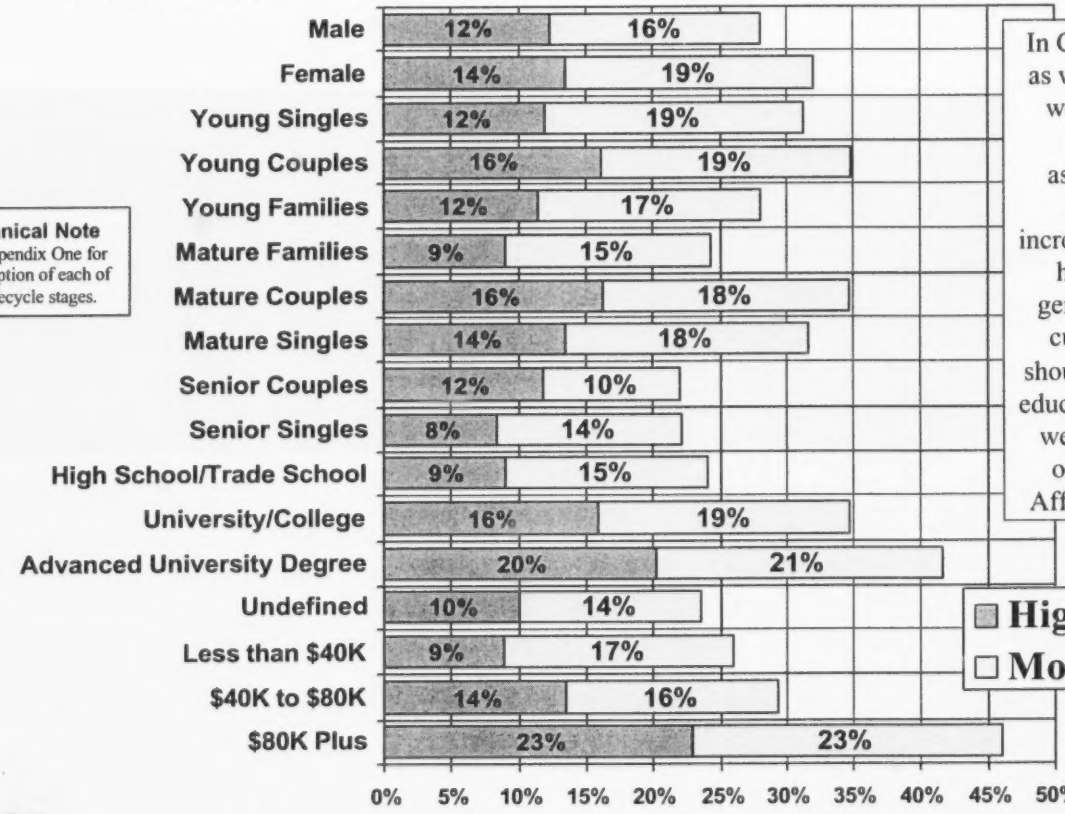
Interest in Wine and Cuisine

Canada:By Demographics

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years


Male 12% 16%
Female 14% 19%
Young Singles 12% 19%
Young Couples 16% 19%
Young Families 12% 17%
Mature Families 9% 15%
Mature Couples 16% 18%
Mature Singles 14% 18%
Senior Couples 12% 10%
Senior Singles 8% 14%
High School/Trade School 9% 15%
University/College 16% 19%
Advanced University Degree 20% 21%
Undefined 10% 14%
Less than $40K 9% 17%
$40K to $80K 14% 16%
$80K Plus 23% 23%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
High Interest
Moderate Interest

Technical Note
See Appendix One for a description of each of the lifecycle stages.

In Canada, young and mature singles as well as young and mature couples were the most likely to exhibit an interest in vacation activities associated with wine and cuisine. Interest in such activities also increased as the level of education and household income increased. In general, the promotion of wine and cuisine related vacation products should target more affluent and better educated sectors of the marketplace as well as singles and couples. (Note: one exception to this trend is the Affluent Families – see Page 8 & 9).

TAMS
Travel Activities & Motivation Survey

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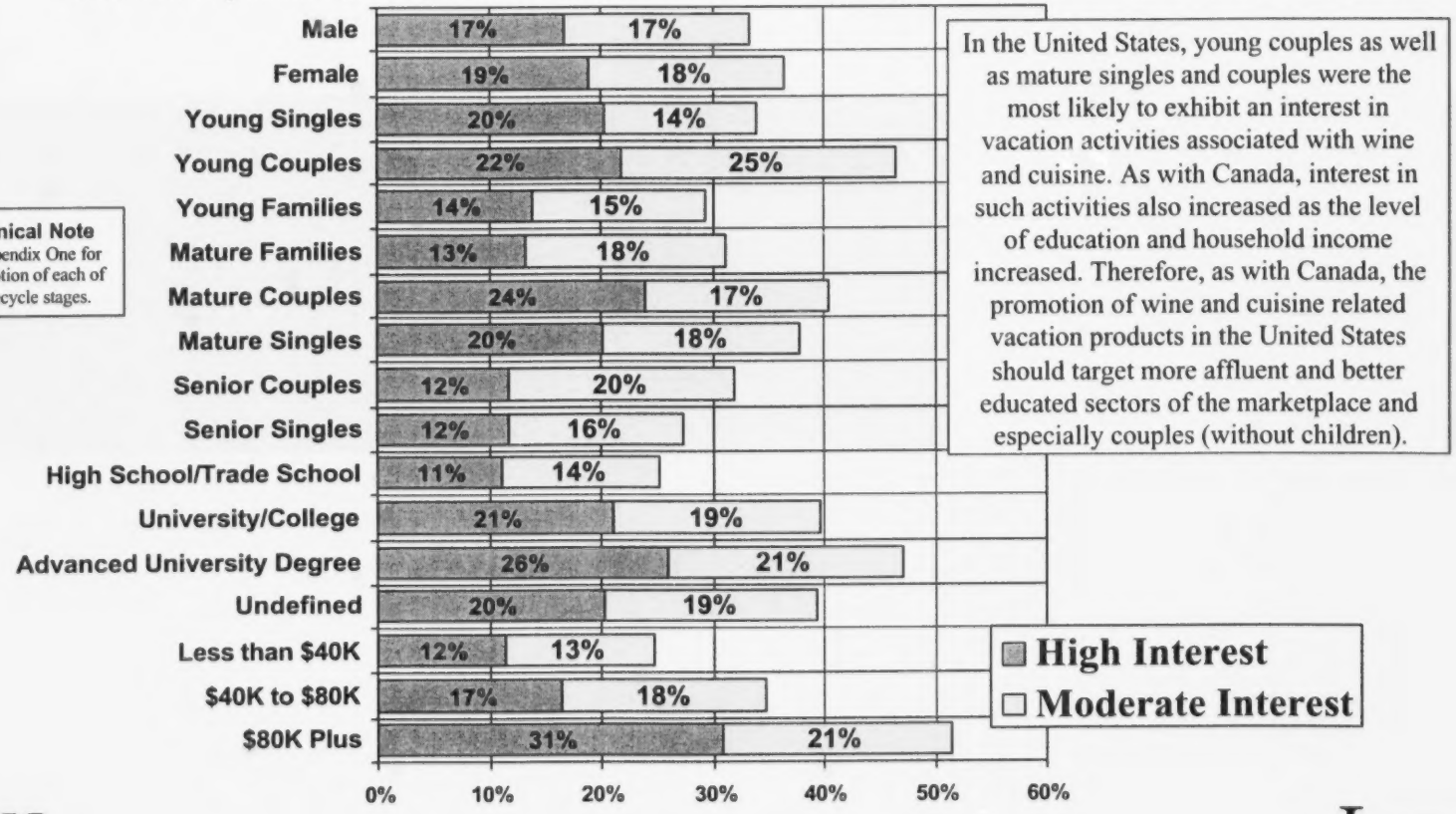
Interest in Wine and Cuisine

United States:By Demographics

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years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$80K Plus 31% 21%
0% 10% 20% 30% 40% 50% 60%
High Interest
Moderate Interest

Technical Note
See Appendix One for a description of each of the lifecycle stages.

In the United States, young couples as well as mature singles and couples were the most likely to exhibit an interest in vacation activities associated with wine and cuisine. As with Canada, interest in such activities also increased as the level of education and household income increased. Therefore, as with Canada, the promotion of wine and cuisine related vacation products in the United States should target more affluent and better educated sectors of the marketplace and especially couples (without children).

TAMS
Travel Activities & Motivation Survey

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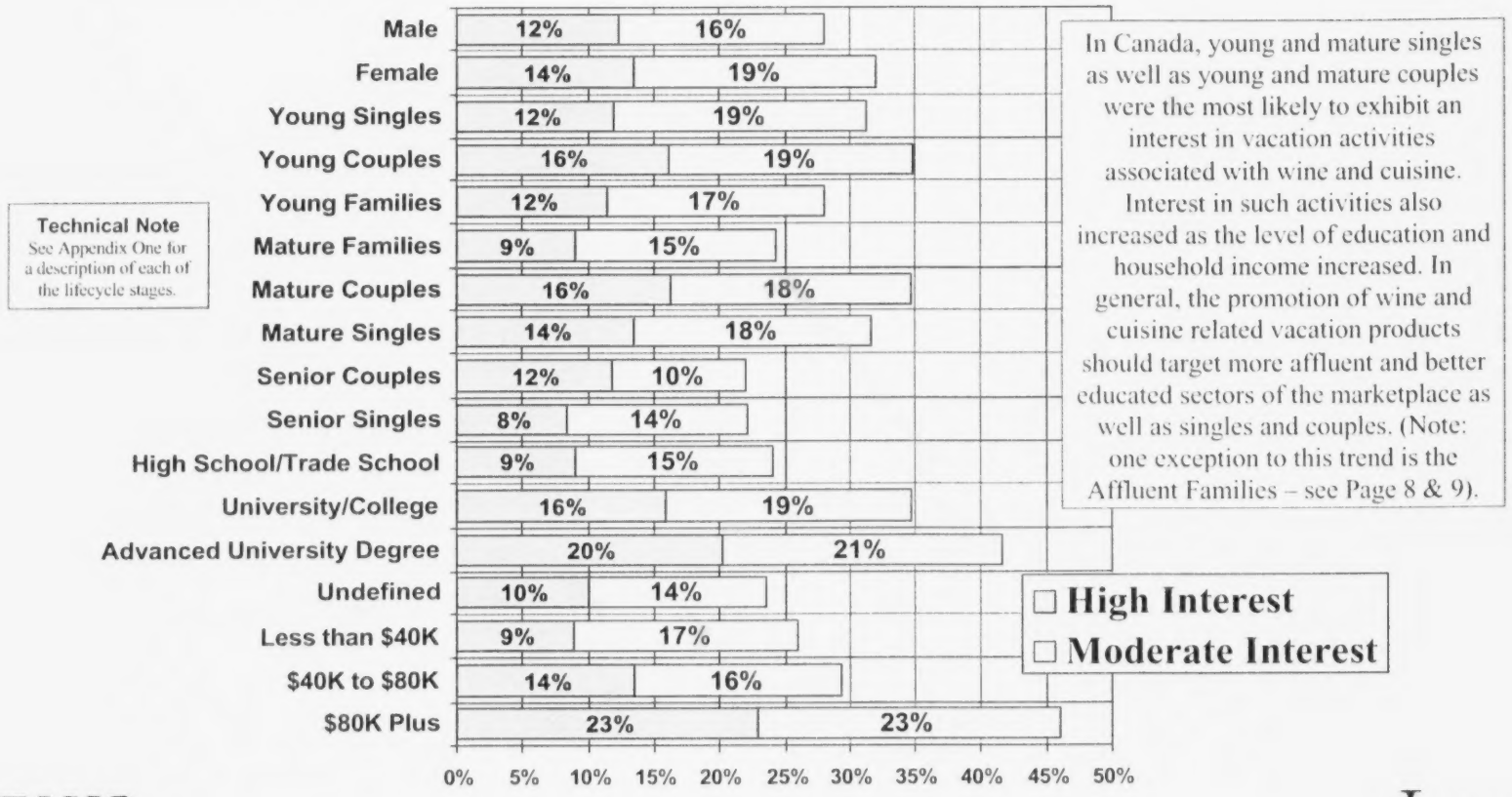
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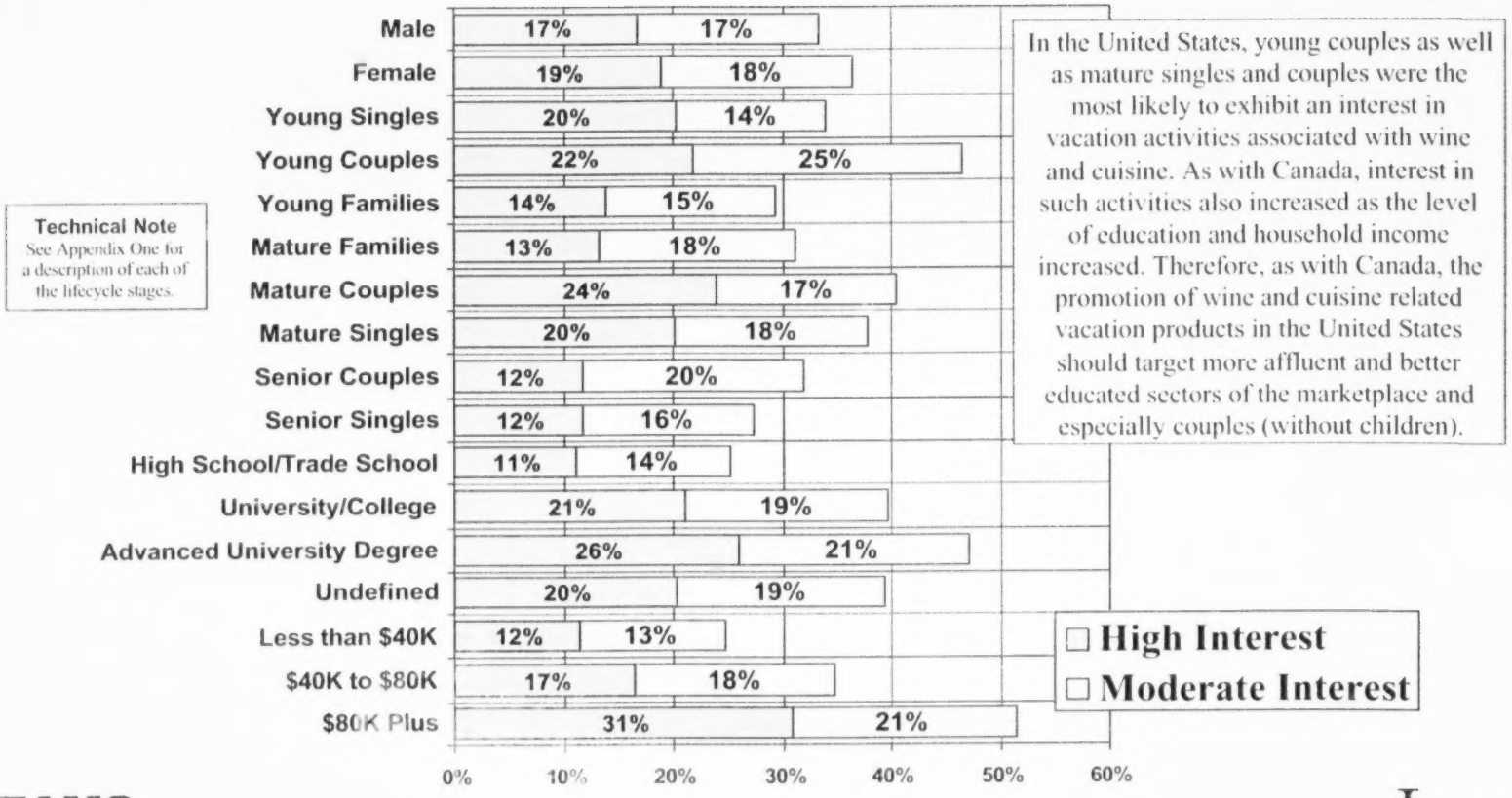
See Appendix One for a description of each of the lifecycle stages.

In Canada, young and mature singles as well as young and mature couples were the most likely to exhibit an interest in vacation activities associated with wine and cuisine. Interest in such activities also increased as the level of education and household income increased. In general, the promotion of wine and cuisine related vacation products should target more affluent and better educated sectors of the marketplace as well as singles and couples. (Note: one exception to this trend is the Affluent Families – see Page 8 & 9).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Travel Activities & Motivation Survey

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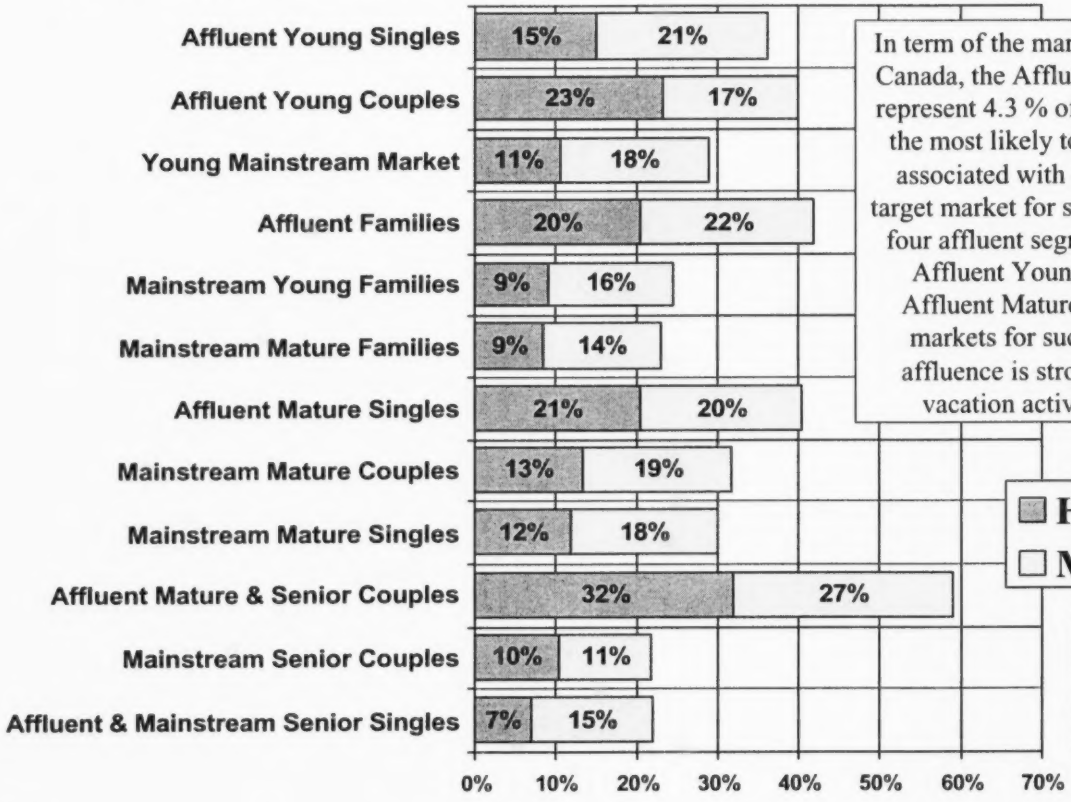
Interest in Wine and Cuisine

Canada:By Market Segment

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



In term of the market segments (see technical notes) in Canada, the Affluent Mature and Senior Couples, who represent 4.3 % of the Canadian adult population were the most likely to be interested in vacation activities associated with wine and cuisine. This is the prime target market for such promotional activities. The other four affluent segments, (e.g Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles) are important secondary markets for such promotional activities. Clearly, affluence is strongly associated with an interest in vacation activities related to wine and cuisine.

Technical Note

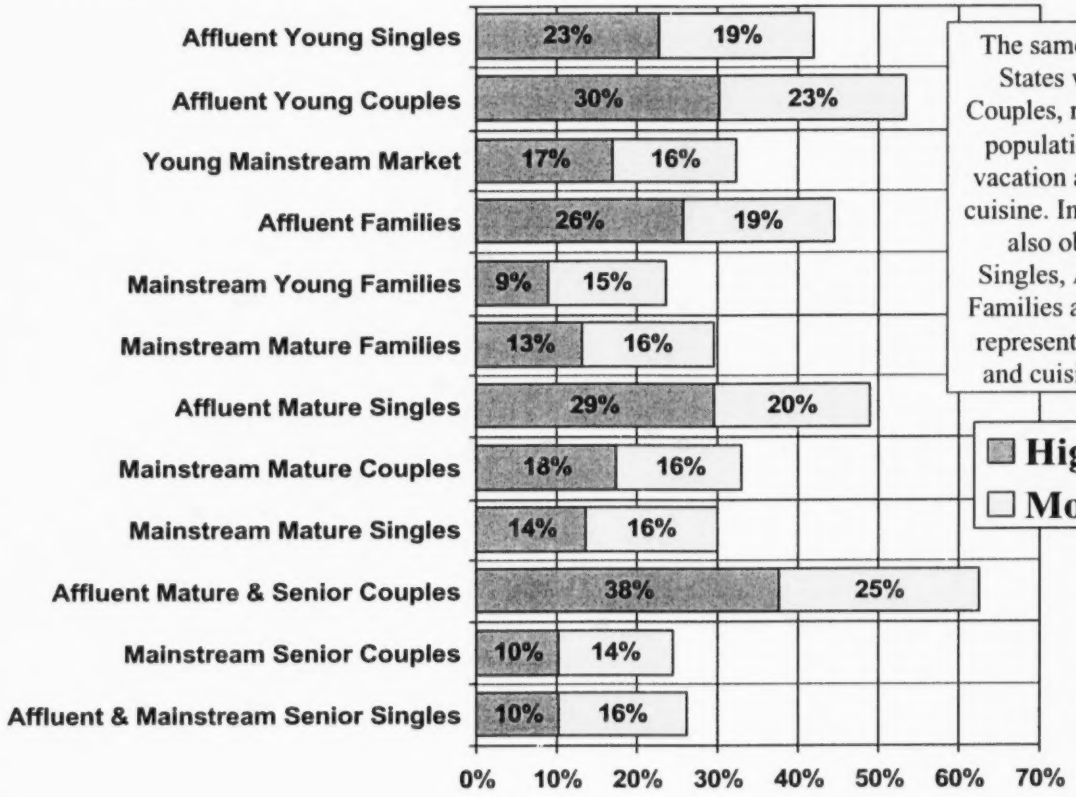
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Wine and Cuisine

United States:By Market Segment

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The same pattern is observed in the United States with Affluent Mature and Senior Couples, representing 5.4 % of the U.S. adult population, exhibiting the most interest in vacation activities associated with wine and cuisine. Increased interest in such activities is also observed among Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles. These represent the prime target markets for wine and cuisine related promotional activities.

High Interest

Moderate Interest

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Travel Activities & Motivation Survey

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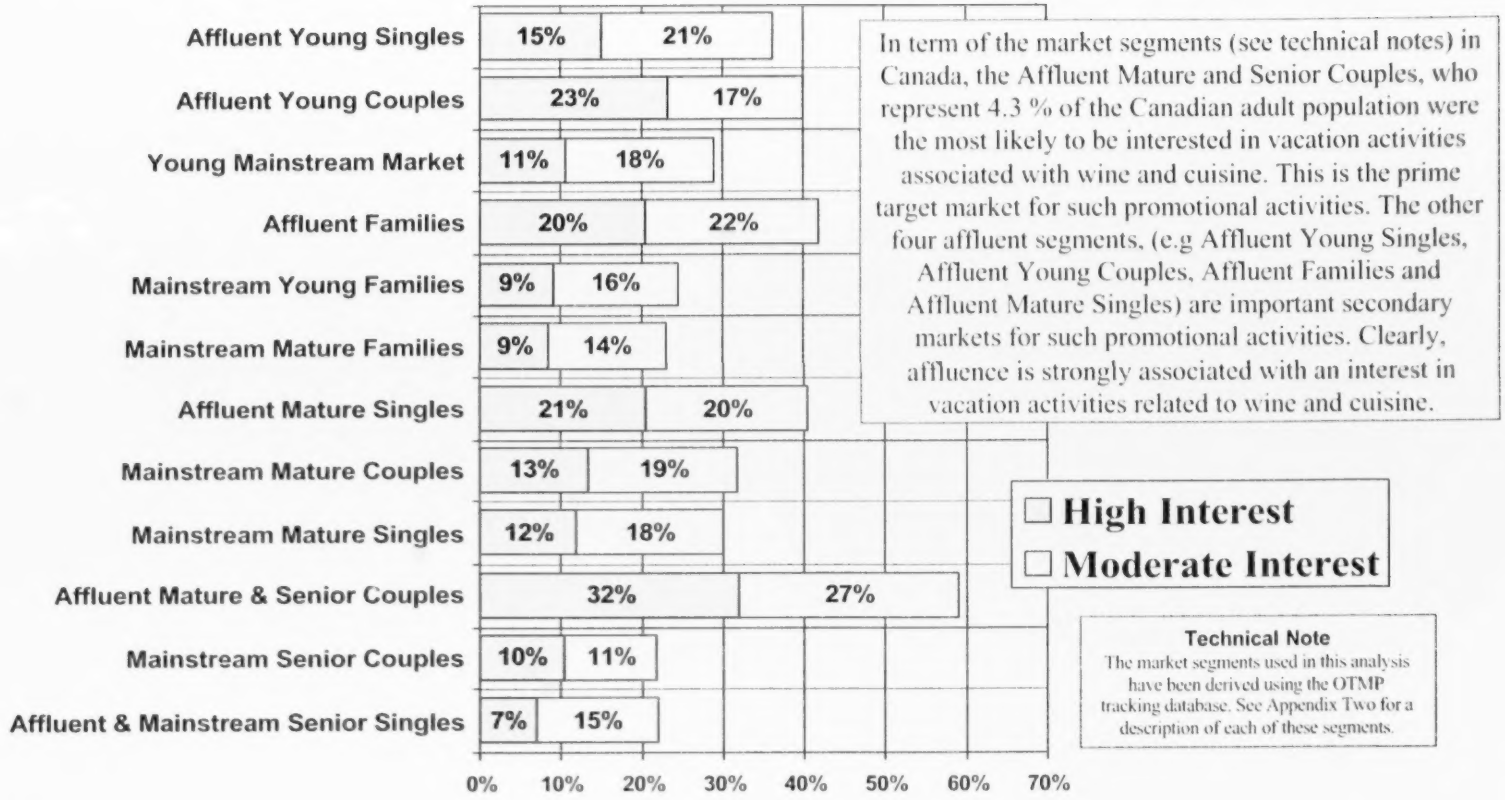
Affluent Young Singles
15%
21%
Affluent Young Couples
23%
17%
Young Mainstream Market
11%
18%
Affluent Families
20%
22%
Mainstream Young Families
9%
16%
Mainstream Mature Families
9%
14%
Affluent Mature Singles
21%
20%
Mainstream Mature Couples
13%
19%
Mainstream Mature Singles
12%
18%
Affluent Mature & Senior Couples
32%
27%
Mainstream Senior Couples
10%
11%
Affluent & Mainstream Senior Singles
7%
15%
0%
10%
20%
30%
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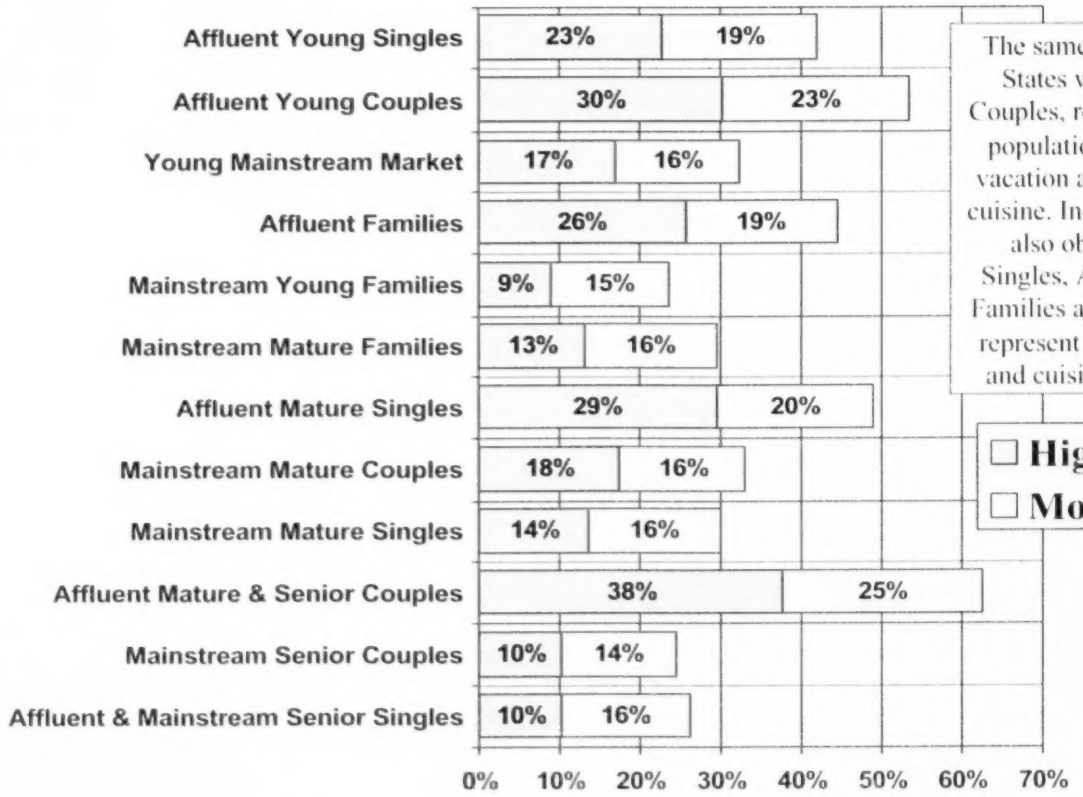

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☐ **High Interest**
☐ **Moderate Interest**

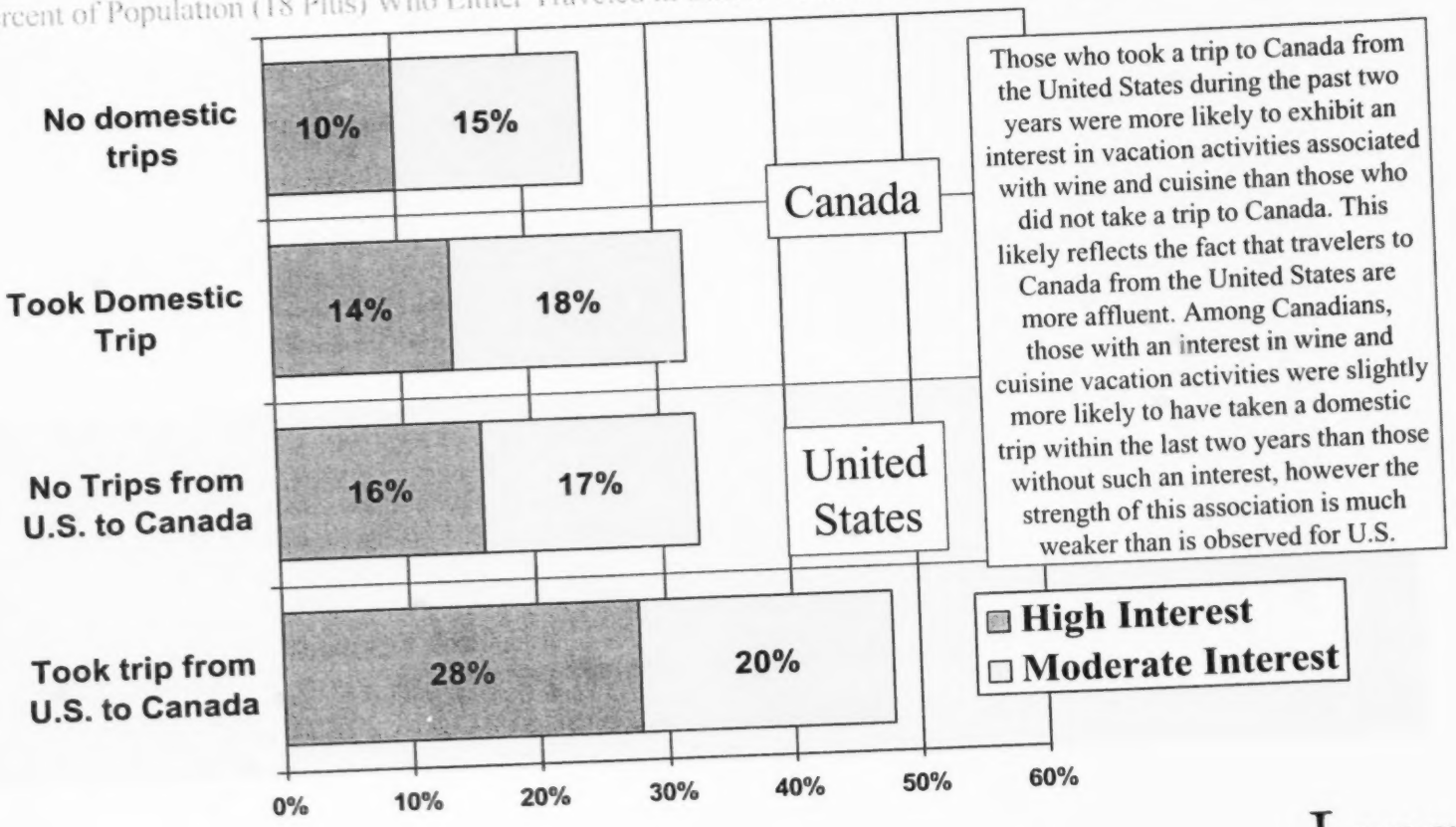
Technical Note
The market segments used in this analysis have been derived using the OTMP tracking database. See Appendix Two for a description of each of these segments.

Interest in Wine and Cuisine

Canada vs. U.S.: By Trips In Canada Last 2 Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



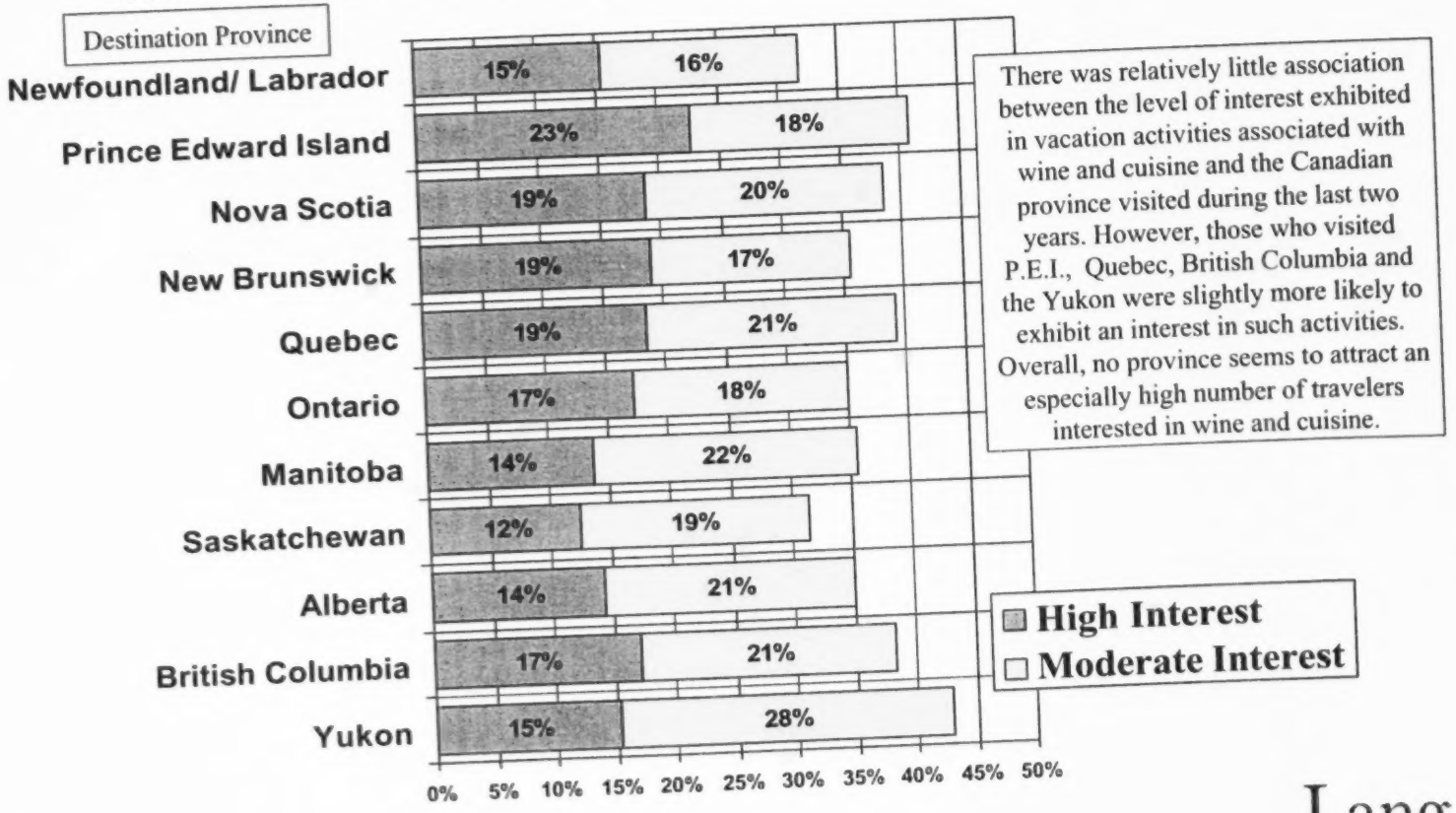
Those who took a trip to Canada from the United States during the past two years were more likely to exhibit an interest in vacation activities associated with wine and cuisine than those who did not take a trip to Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent. Among Canadians, those with an interest in wine and cuisine vacation activities were slightly more likely to have taken a domestic trip within the last two years than those without such an interest, however the strength of this association is much weaker than is observed for U.S.

Interest in Wine and Cuisine

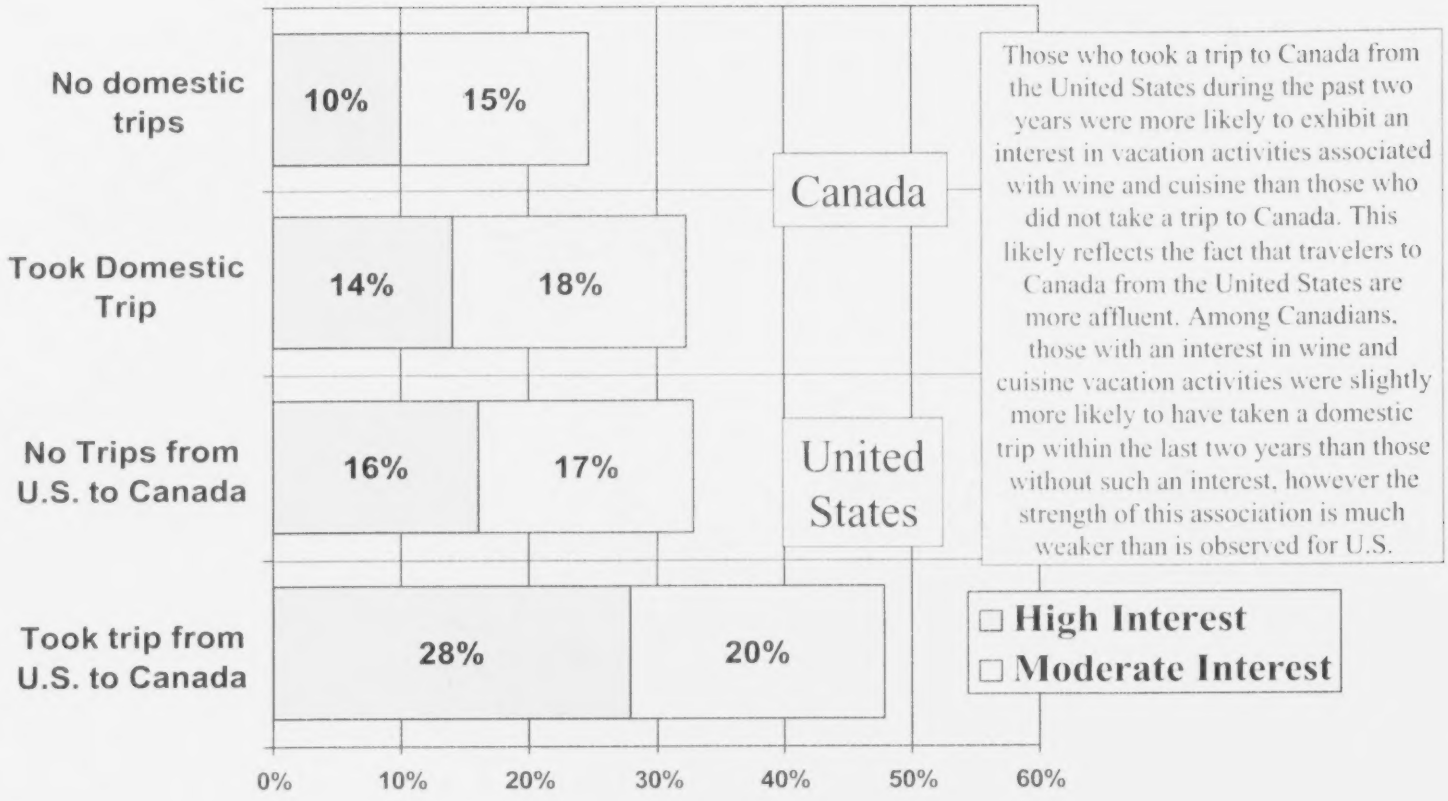
Canada: Interest By Province Traveled To

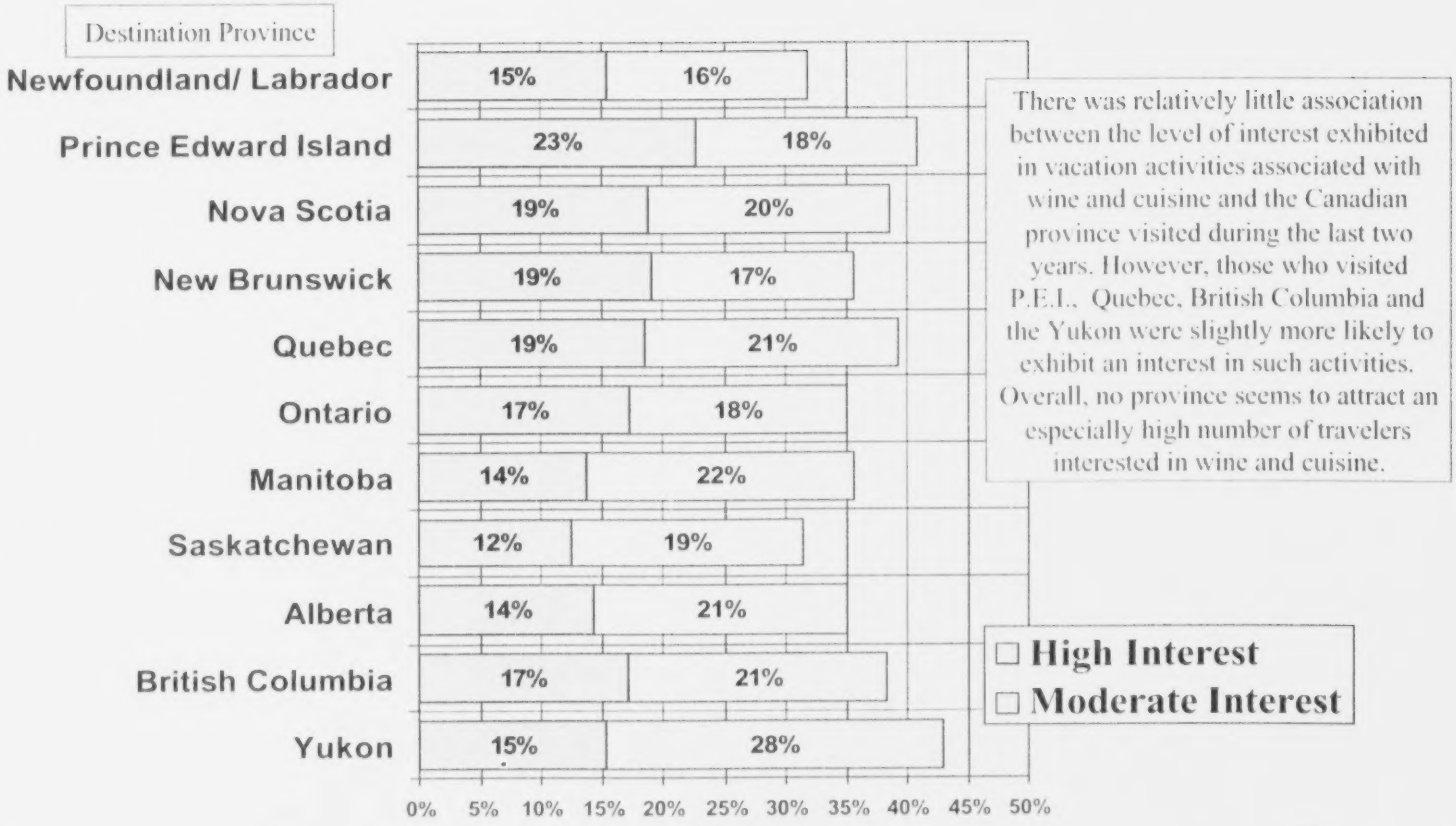
Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Visited a Province During the Last 2 Years



There was relatively little association between the level of interest exhibited in vacation activities associated with wine and cuisine and the Canadian province visited during the last two years. However, those who visited P.E.I., Quebec, British Columbia and the Yukon were slightly more likely to exhibit an interest in such activities. Overall, no province seems to attract an especially high number of travelers interested in wine and cuisine.


No domestic trips
Took Domestic Trip
No Trips from U.S. to Canada
Took trip from U.S. to Canada
10%
15%
14%
18%
16%
17%
28%
20%
Canada
United States
0%
10%
20%
30%
40%
50%
60%
High Interest
Moderate Interest
Those who took a trip to Canada from the United States during the past two years were more likely to exhibit an interest in vacation activities associated with wine and cuisine than those who did not take a trip to Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent. Among Canadians, those with an interest in wine and cuisine vacation activities were slightly more likely to have taken a domestic trip within the last two years than those without such an interest, however the strength of this association is much weaker than is observed for U.S.



TAMS
Travel Activities & Motivation Survey

TAMS Wine and Cuisine Report

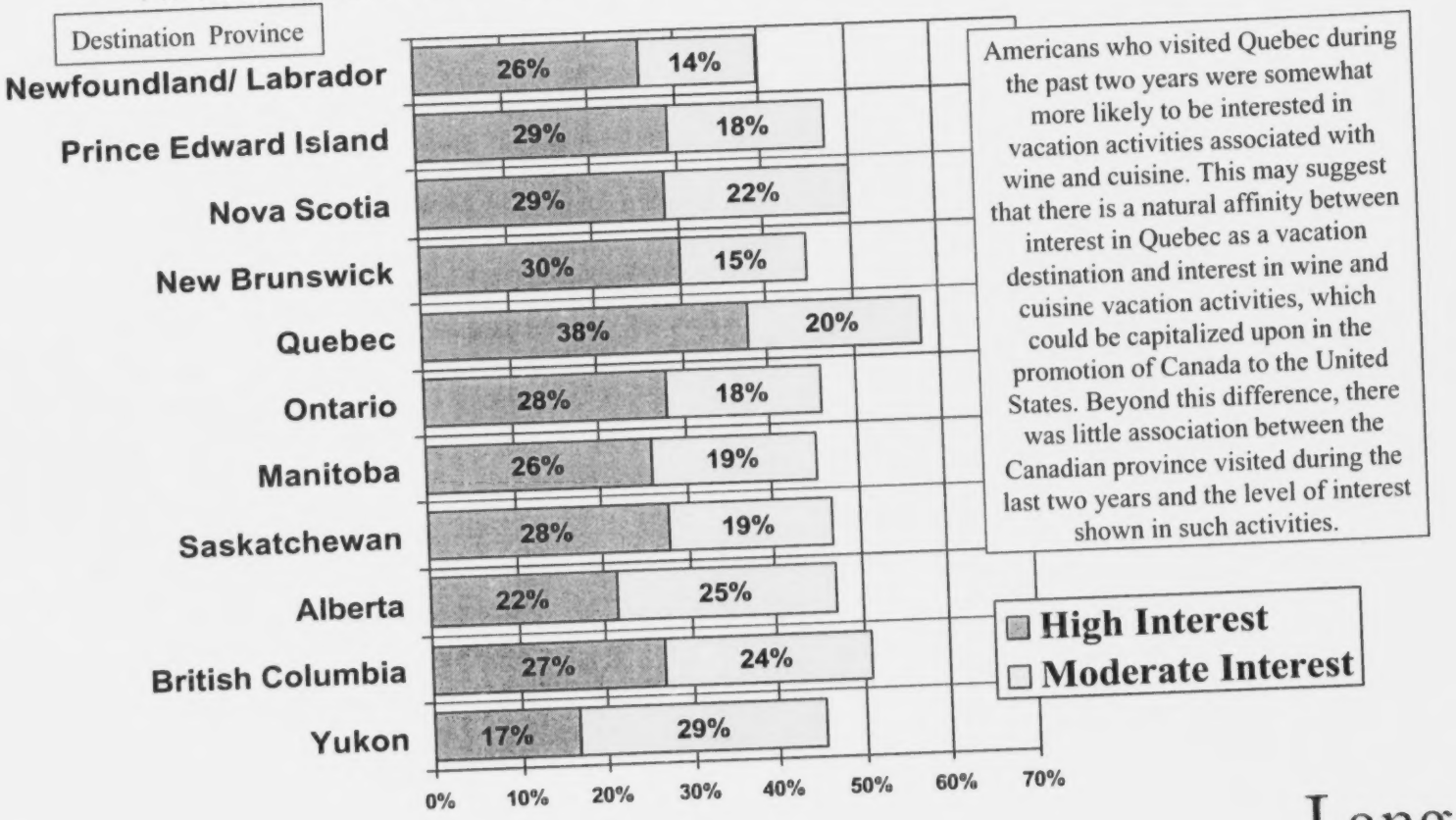
Lang

Interest in Wine and Cuisine

United States: Interest By Province Traveled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Visited a Province During the Last 2 Years



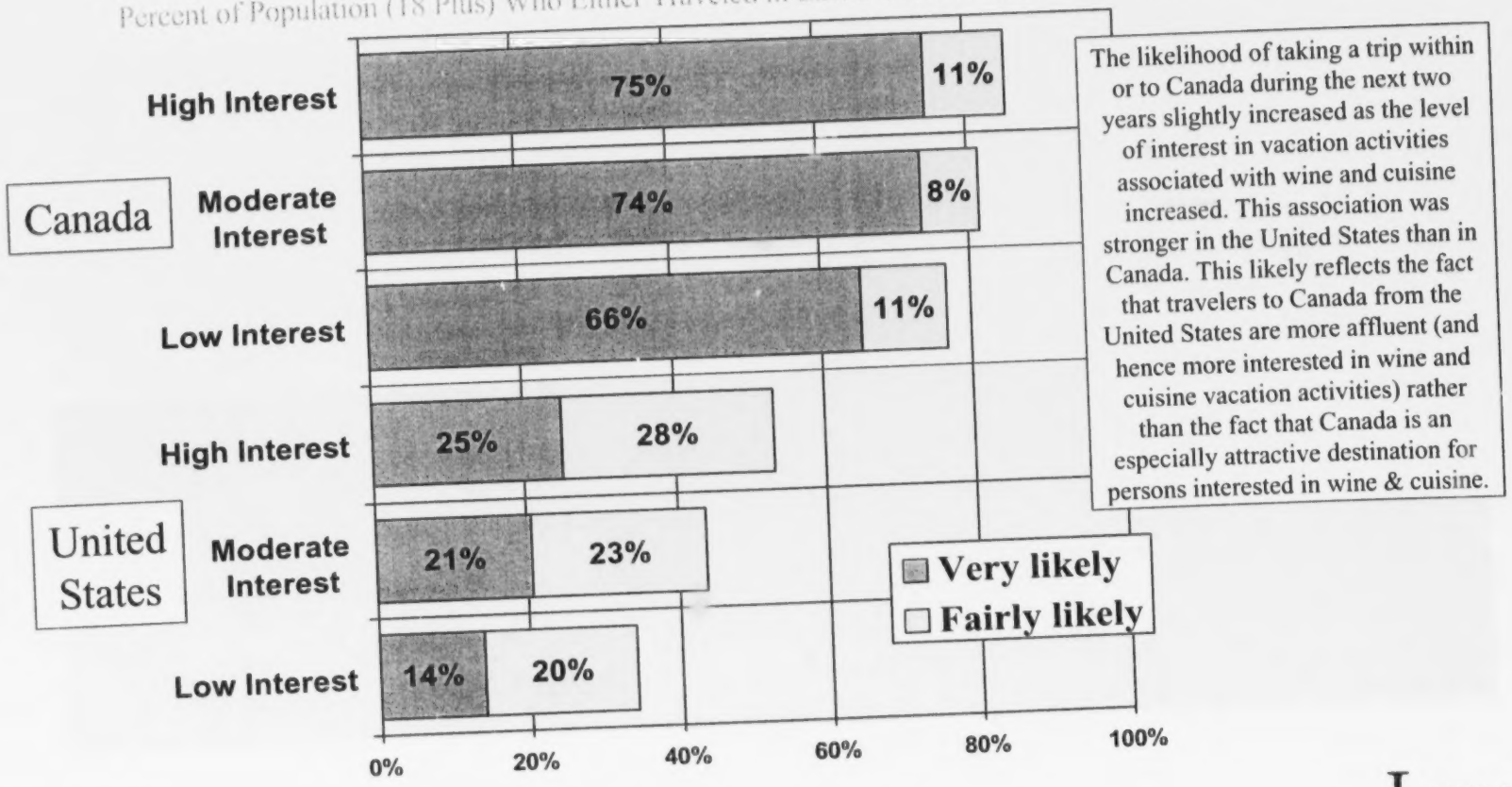
Americans who visited Quebec during the past two years were somewhat more likely to be interested in vacation activities associated with wine and cuisine. This may suggest that there is a natural affinity between interest in Quebec as a vacation destination and interest in wine and cuisine vacation activities, which could be capitalized upon in the promotion of Canada to the United States. Beyond this difference, there was little association between the Canadian province visited during the last two years and the level of interest shown in such activities.

Interest in Wine and Cuisine

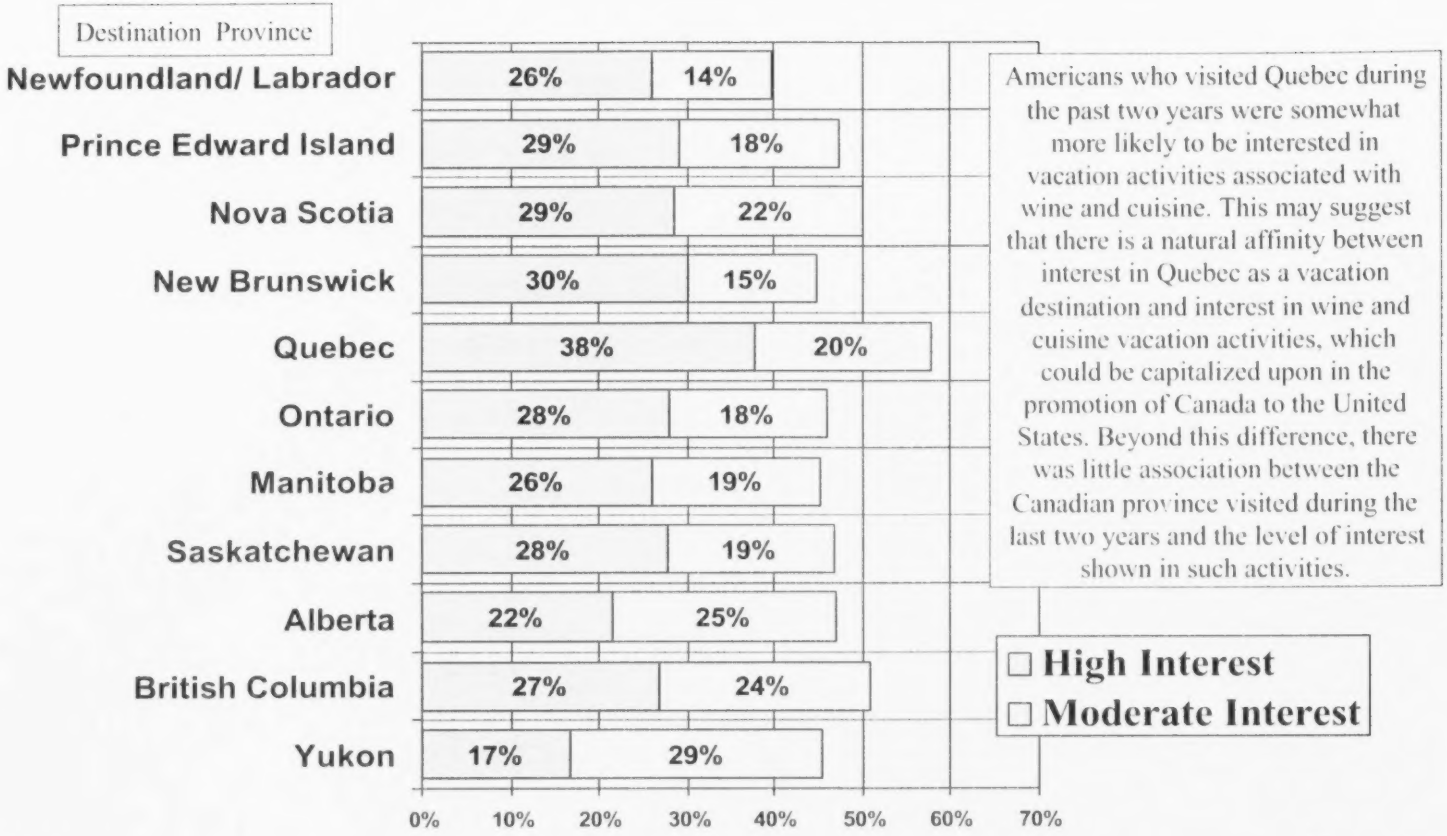
Intentions to Travel to Canada in Next Two 2 Years

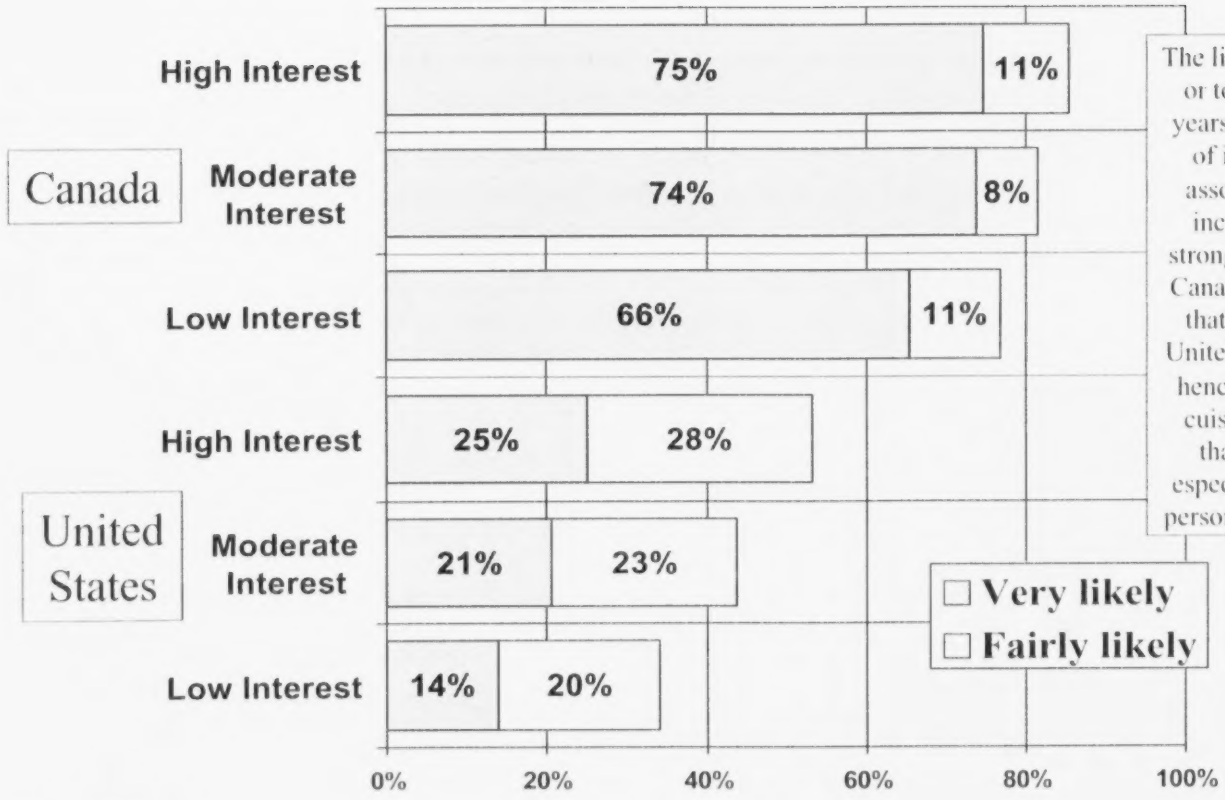
Interest in Wine and Cuisine By Intentions to Travel In Canada During Next 2 Years

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The likelihood of taking a trip within or to Canada during the next two years slightly increased as the level of interest in vacation activities associated with wine and cuisine increased. This association was stronger in the United States than in Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent (and hence more interested in wine and cuisine vacation activities) rather than the fact that Canada is an especially attractive destination for persons interested in wine & cuisine.

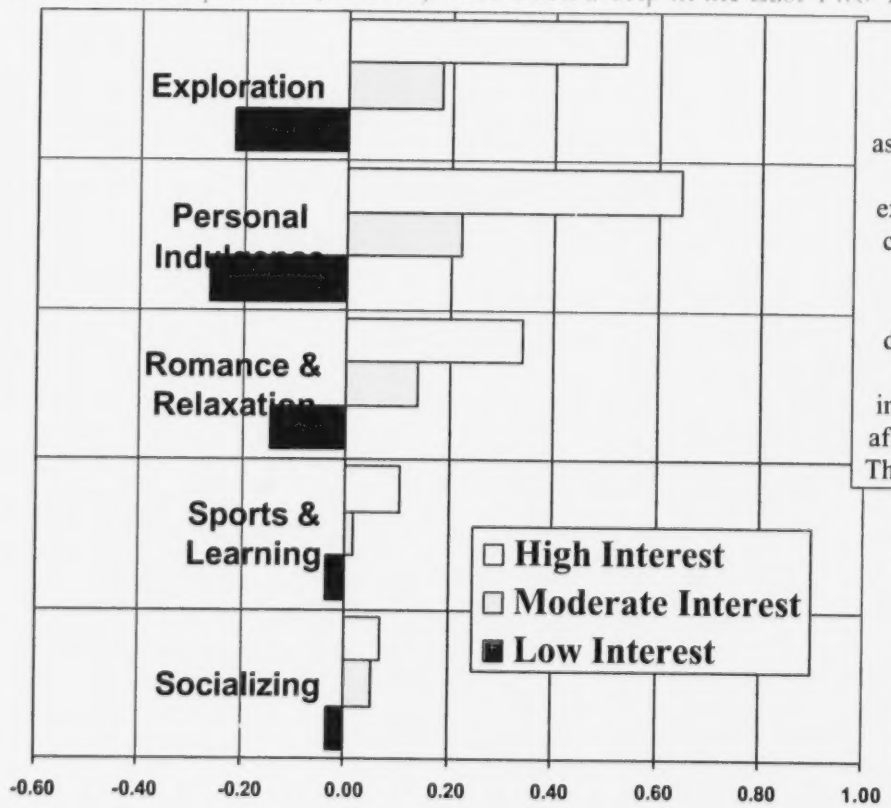

Destination Province
Newfoundland/ Labrador
Prince Edward Island
Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Yukon
26%
14%
29%
18%
29%
22%
30%
15%
38%
20%
28%
18%
26%
19%
28%
19%
22%
25%
27%
24%
17%
29%
0%
10%
20%
30%
40%
50%
60%
70%
Americans who visited Quebec during the past two years were somewhat more likely to be interested in vacation activities associated with wine and cuisine. This may suggest that there is a natural affinity between interest in Quebec as a vacation destination and interest in wine and cuisine vacation activities, which could be capitalized upon in the promotion of Canada to the United States. Beyond this difference, there was little association between the Canadian province visited during the last two years and the level of interest shown in such activities.
High Interest
Moderate Interest



The likelihood of taking a trip within or to Canada during the next two years slightly increased as the level of interest in vacation activities associated with wine and cuisine increased. This association was stronger in the United States than in Canada. This likely reflects the fact that travelers to Canada from the United States are more affluent (and hence more interested in wine and cuisine vacation activities) rather than the fact that Canada is an especially attractive destination for persons interested in wine & cuisine.

General Vacation Experiences Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



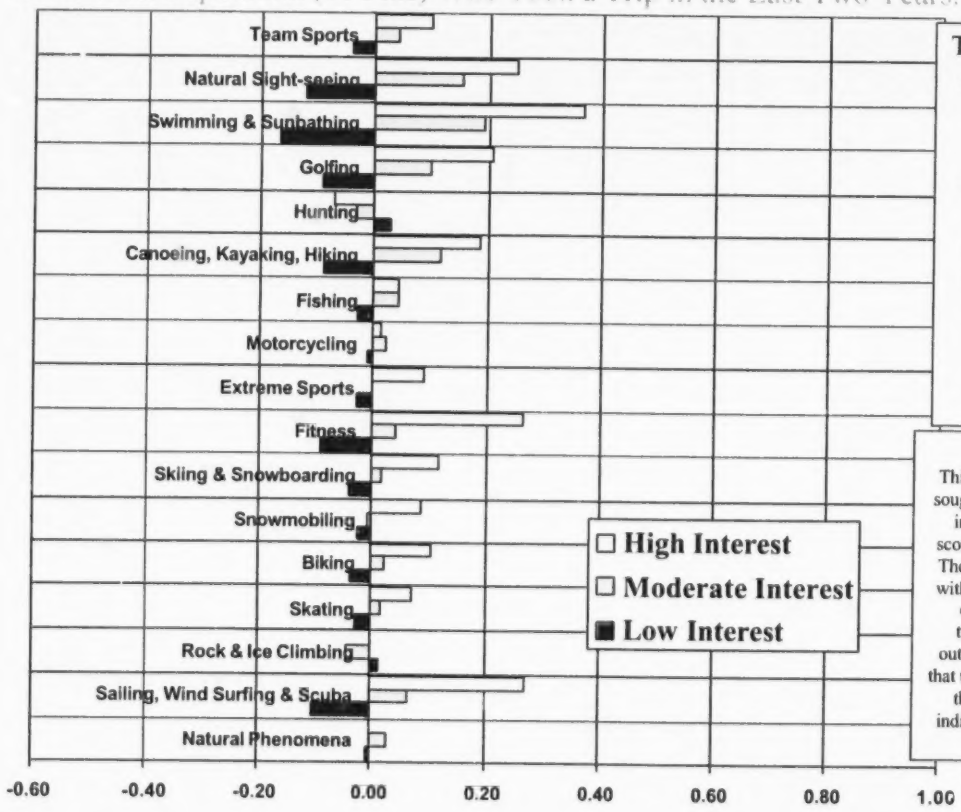
Those who exhibit an interest in vacation activities associated with wine and cuisine were considerably more likely to have sought out vacation experiences associated with exploration (e.g., visiting historical sites, natural wonders), personal indulgence (e.g., to experience the good life, visiting a casino, experiencing city life such as night life) and romance and relaxation (e.g., experience intimacy and romance, relax and recuperate). Advertising and promotional materials designed to promote wine and cuisine products should emphasize the cultural, entertainment and romantic images of the destination and be specifically targeted at affluent couples, and to a certain extent, affluent singles. There should be a hedonistic quality to these promotions.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



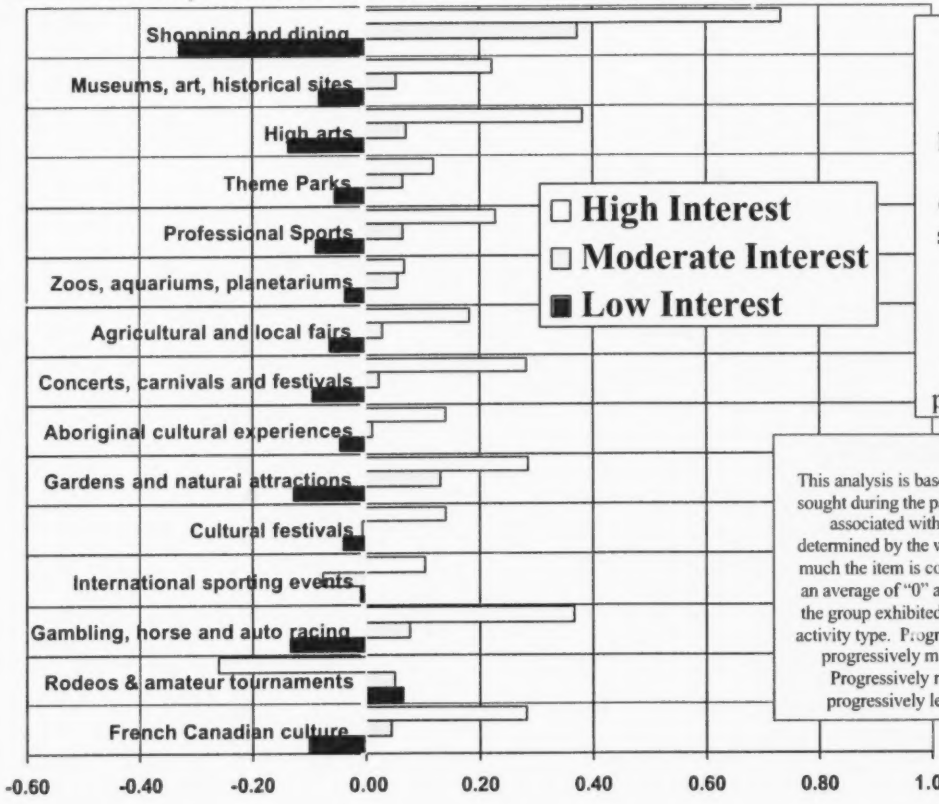
Those who exhibit an interest in vacation activities associated with wine and cuisine were also more likely to have participated in outdoor activities while on a trip. This association is especially strong for those who participated in water sports (e.g., sailing, scuba diving), fitness activities, swimming and sunbathing, team sports, natural sightseeing (e.g., viewing wildflower and flora, going on picnics in park settings) and golfing. These sorts of activities are more likely to be undertaken by the more affluent travelers and especially affluent couples and singles.

Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the outdoor vacation activity type.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



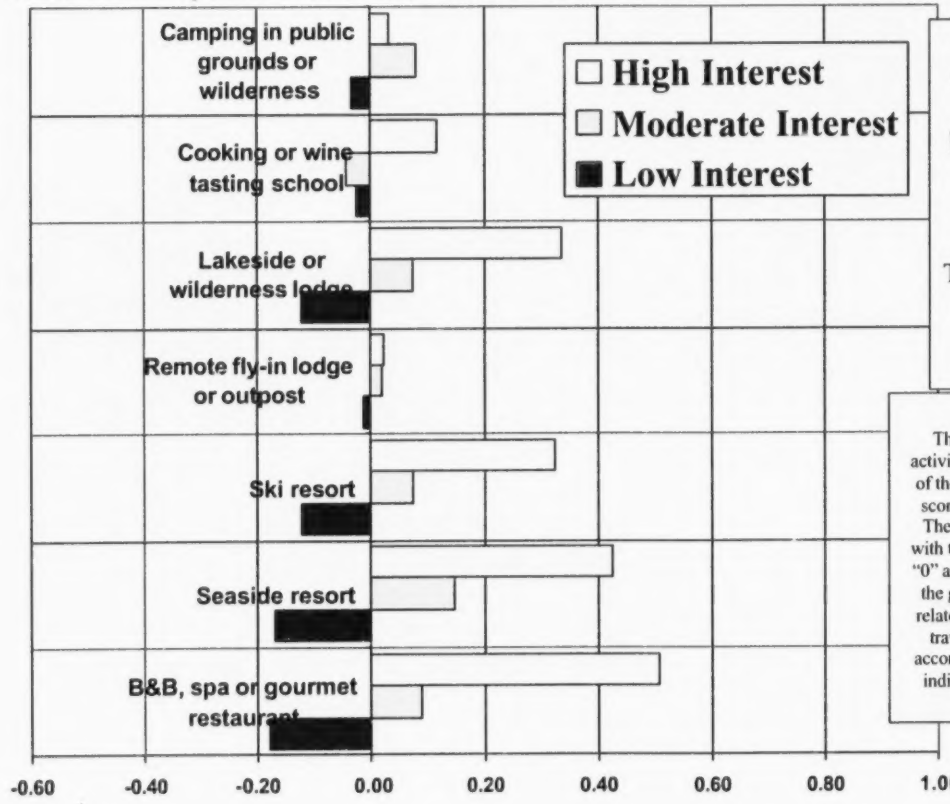
There is a stronger association between an interest in vacation activities associated with wine and cuisine and the likelihood of participation in most cultural and entertainment activities while on a trip than is observed for outdoor activities. This association is especially strong for those who shopped or dined, attended a high art performance (e.g., ballet, opera), attended a concert, carnival or fairs visited a botanical garden or visited a casino. These cultural and entertainment activities should be promoted in wine and cuisine vacation packages.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given culture an entertainment vacation activity type. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

Accommodation-Related Activities Sought During Pleasure Travel in the Past 2 Years By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



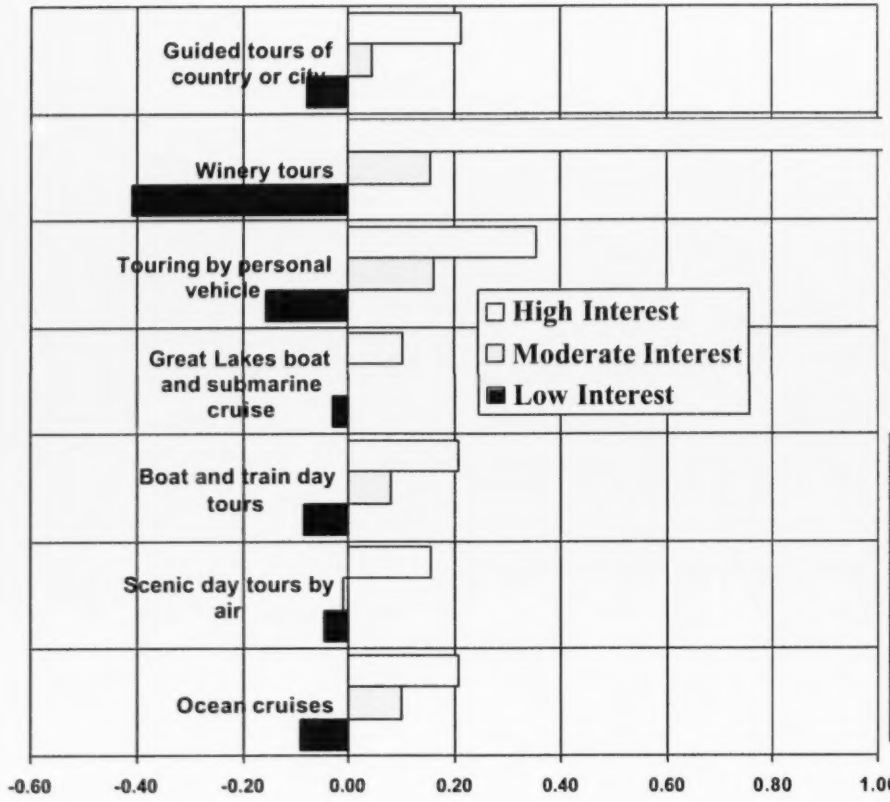
Those who exhibited an interest in vacation activities associated with wine and cuisine were also more likely to have stayed in a bed and breakfast, health spa or gourmet restaurant (with accommodations), a ski or seaside resort, a lakeside or wilderness lodge, or a cooking or wine tasting school (with accommodations). There was little association between an interest in activities associated with wine and cuisine and camping in a public camp ground or the wilderness.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travelers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travelers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

Day & Overnight Touring Activities in the Past 2 Years
By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



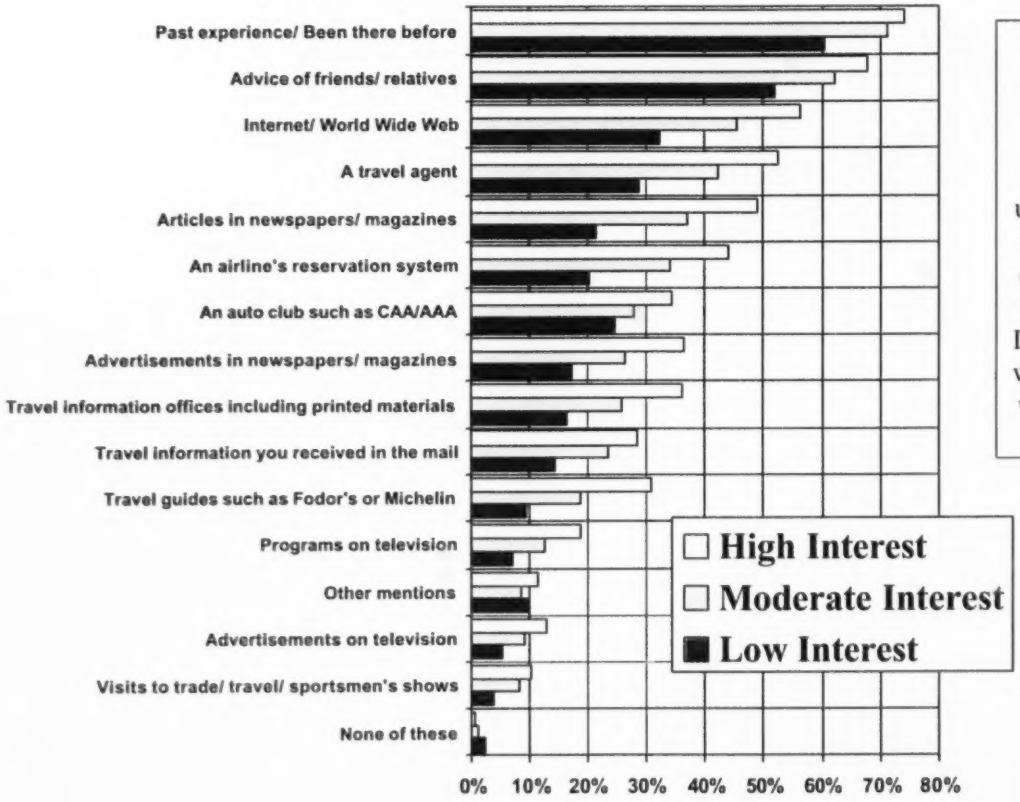
Those who exhibited an interest in vacation activities associated with wine and cuisine were also more likely to have toured a winery either on a day trip or an overnight tour of a wine region (Note: Items in this factor were used to construct the wine and cuisine interest index). There is also a slight association with interest in activities associated with all other types of touring activities. Overall, the association between an interest in wine and cuisine related vacation activities and touring (other than wine tours) is weak, and should not be featured when promoting these types of vacation experiences.

Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travelers in the group exhibited an average tendency to have participated in a given type of touring activity. Progressively more positive values indicate that the travelers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travelers within the group were progressively less likely to have participated in a given type of touring activity.

Sources of Information Consulted to Plan Brief Vacations By Interest in Wine and Cuisine

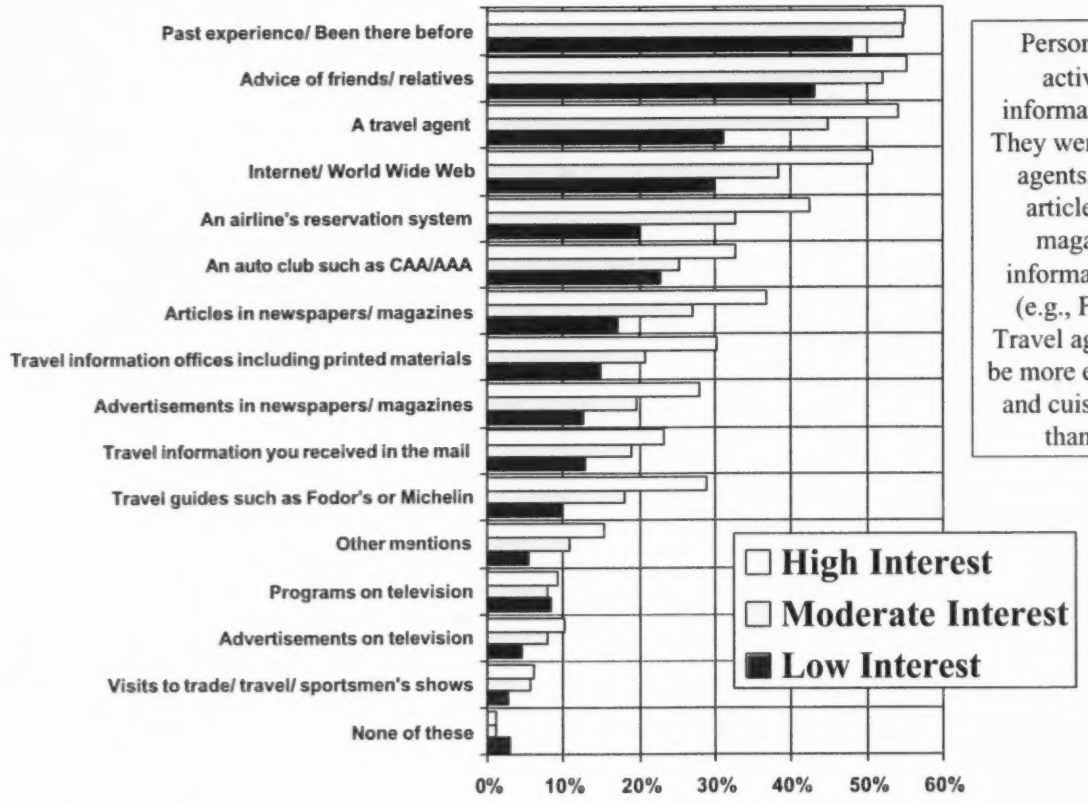
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Past experience/ Been there before
Advice of friends/ relatives
Internet/ World Wide Web
A travel agent
Articles in newspapers/ magazines
An airline's reservation system
An auto club such as CAA/AAA
Advertisements in newspapers/ magazines
Travel information offices including printed materials
Travel information you received in the mail
Travel guides such as Fodor's or Michelin
Programs on television
Other mentions
Advertisements on television
Visits to trade/ travel/ sportsmen's shows
None of these
0% 10% 20% 30% 40% 50% 60% 70% 80%
High Interest
Moderate Interest
Low Interest

Those who exhibited an interest in vacation activities associated with wine and cuisine tended to have consulted a larger number of information sources to plan their brief vacations. They were especially likely to have used the Internet, articles and advertisements in newspapers and magazines, travel information offices and travel guides (e.g., Fodor's) to help plan their brief vacations. Print media and the Internet appear to be more efficient channels by which to promote wine and cuisine related brief vacation products, rather than television, direct mail or automotive associations.

Sources of Information Consulted to Plan Longer Vacations By Interest in Wine and Cuisine

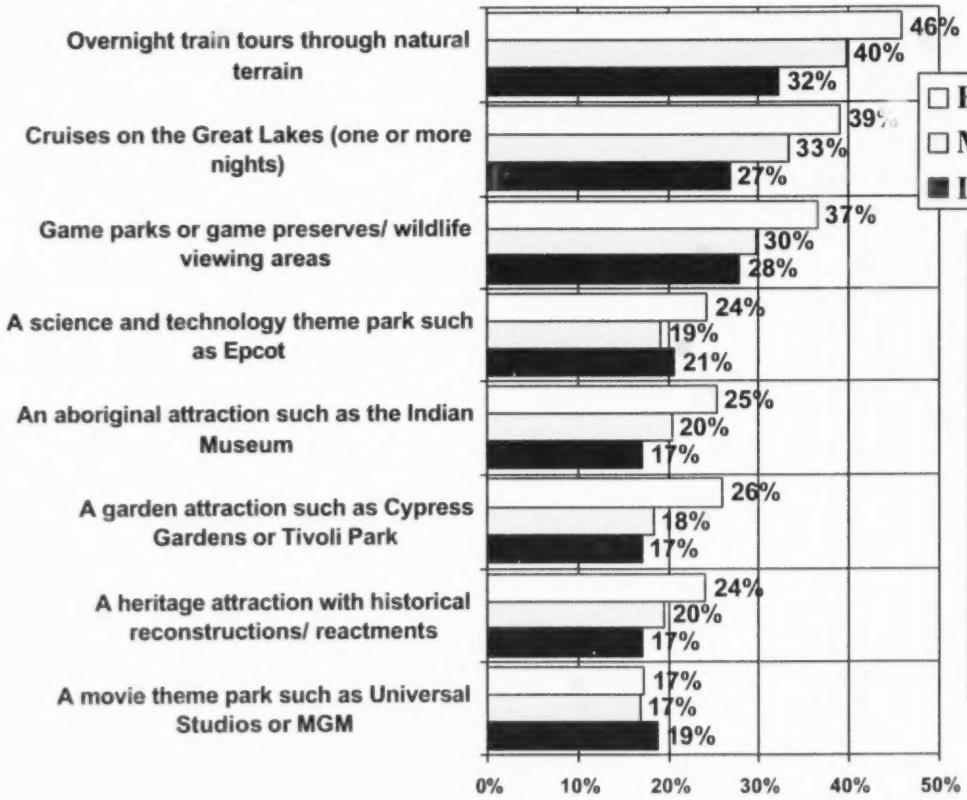
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Persons interested in wine and cuisine vacation activities also consulted a larger number of information sources to plan their longer vacations. They were especially more likely to have used travel agents, the Internet, airline reservation systems, articles and advertisements in newspapers and magazines, travel information offices, travel information received in the mail and travel guides (e.g., Fodor's) to help plan their brief vacations. Travel agents, print media and the Internet appear to be more efficient channels by which to promote wine and cuisine related longer vacation products rather than television or automotive associations.

Interest in New Tourism Products
By Interest in Wine and Cuisine (Part One of Two)

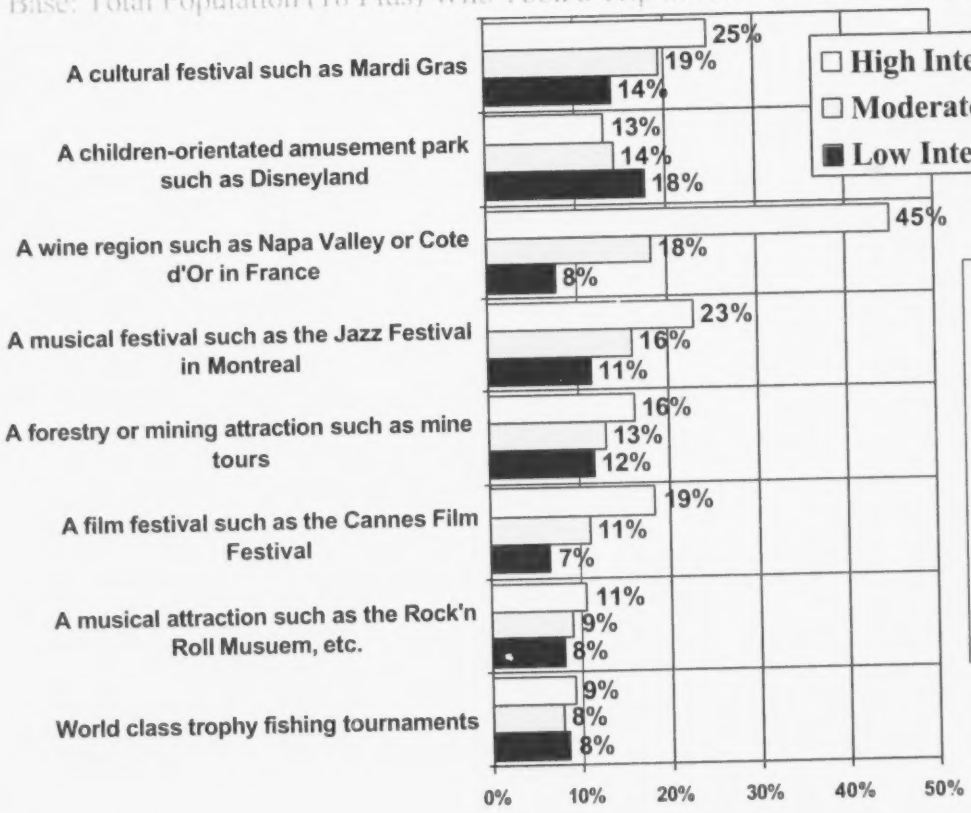
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Respondents were asked whether each of sixteen new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Among the more popular attractions assessed, those who exhibited an interest in activities associated with wine and cuisine were more likely to be interested in an overnight train tour through natural terrain, a cruise on the Great Lakes and a games park or games preserve with wildlife viewing areas. Those with a high interest in wine and cuisine were also more likely to report that an aboriginal attraction such as the Indian Museum or a garden attraction such as Cypress Gardens would make them a lot more interested in taking a trip to Ontario.

Interest in New Tourism Products
By Interest in Wine and Cuisine (Part Two of Two)

Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)

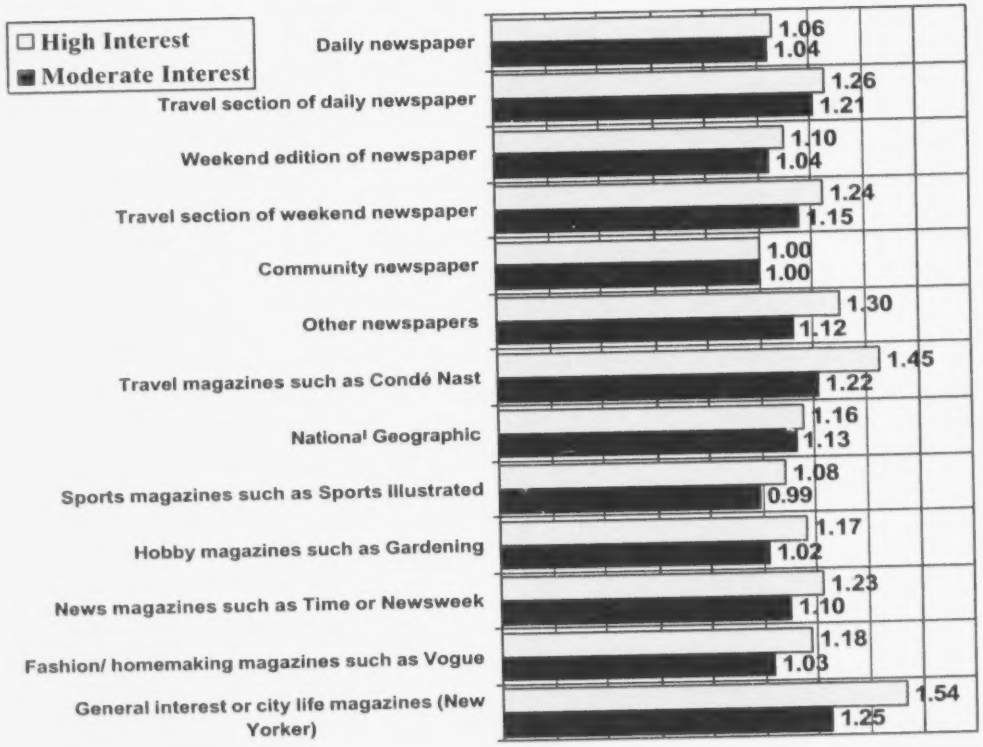


Those who exhibited an interest in vacation activities associated with wine and cuisine were also more likely to be interested in areas with a wine region. (Note: This item was used to construct the wine and cuisine interest index). There was also an association between interest in wine and cuisine and interest in cultural festivals, musical festivals and film festivals. Combining wine and cuisine vacation activities with festivals would be effective tourism package for this market.

Media Index for Print Media: Canada & United States

By High Interest in Wine and Cuisine

Percent Reading Each Publication Type Among Those With High Interest in Wine and Cuisine, By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for types of print media (see Technical Note below) suggests that general interest magazines (e.g., New Yorker or Harper's) and travel magazines (e.g., Travel and Leisure) are the most efficient methods by which to reach individuals who are interested in wine and cuisine related vacation activities. Such individuals are also likely to read the travel section of their newspaper, Canadian or National Geographic, news magazines (e.g., Times, Macleans) and fashion or homemaking magazines such as Chatelaine, Vogue or Women's Day.

Technical Note

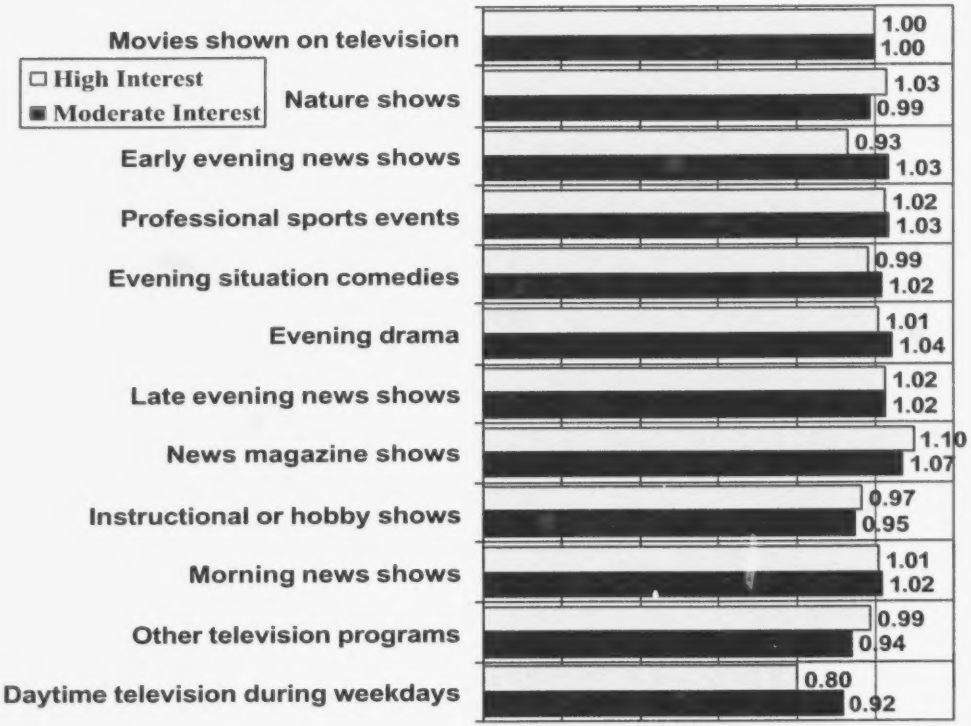
The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in wine and cuisine were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States

By High Interest in Wine and Cuisine

Percent Watching Each Type of Television Program Among Those With High Interest in Wine and Cuisine. By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


High Interest
Moderate Interest
Movies shown on television 1.00 1.00
Nature shows 1.03 0.99
Early evening news shows 0.93 1.03
Professional sports events 1.02 1.03
Evening situation comedies 0.99 1.02
Evening drama 1.01 1.04
Late evening news shows 1.02 1.02
News magazine shows 1.10 1.07
Instructional or hobby shows 0.97 0.95
Morning news shows 1.01 1.02
Other television programs 0.99 0.94
Daytime television during weekdays 0.80 0.92

Those interested in vacation activities associated with wine and cuisine were more slightly likely to watch news magazine programming and less likely to watch daytime television. Beyond this there is little association between television viewer preferences and interest in vacation activities associated with wine and cuisine. Overall, television is not recommended for these sorts of promotional activities.

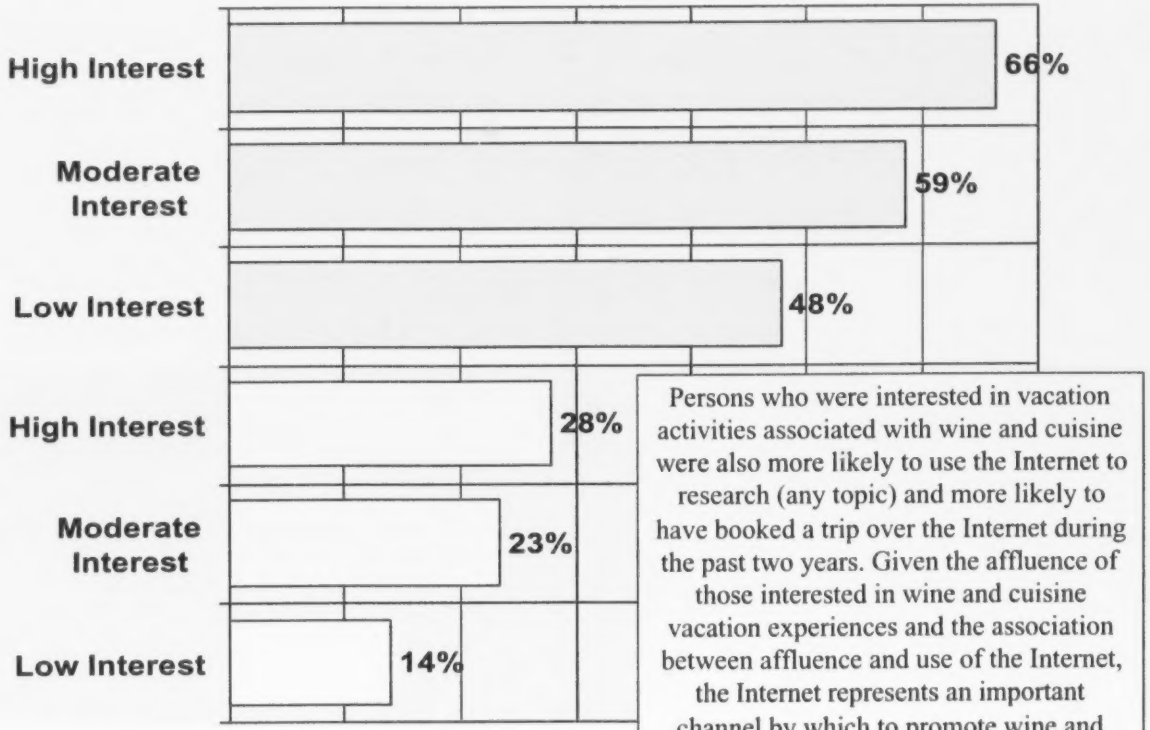
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that persons very interested in wine and cuisine were 20 % more likely to read a particular publication than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet

By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Persons who were interested in vacation activities associated with wine and cuisine were also more likely to use the Internet to research (any topic) and more likely to have booked a trip over the Internet during the past two years. Given the affluence of those interested in wine and cuisine vacation experiences and the association between affluence and use of the Internet, the Internet represents an important channel by which to promote wine and cuisine related vacation products.

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a ten point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

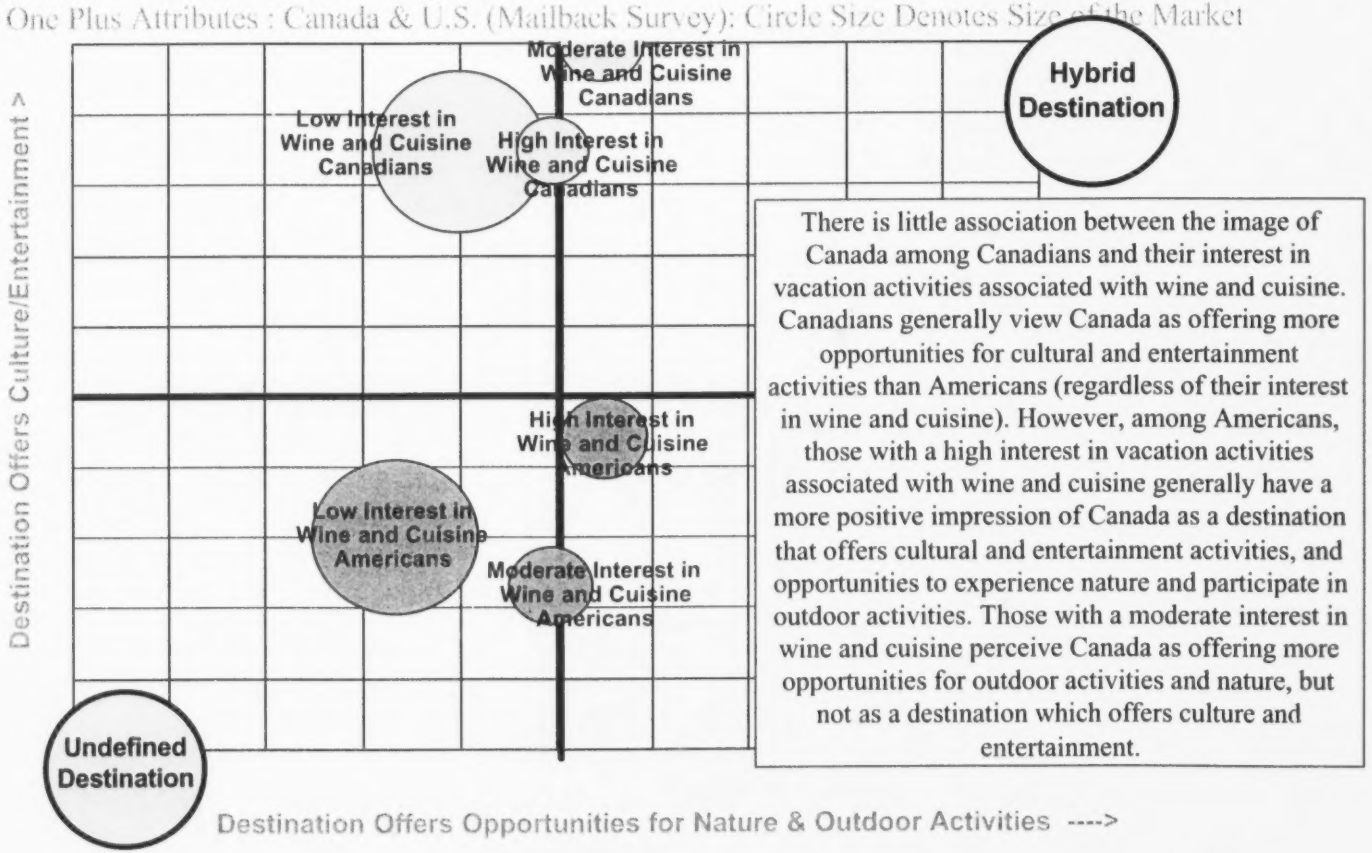
Hybrid Destination
Culture & Entertainment Only
Culture, Entertainment & Nature/Outdoor Activities
Neither Culture/ Entertainment nor Nature & Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canada and United States

Canadian Vacation Imagery

By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Moderate Interest in Wine and Cuisine Canadians
Hybrid Destination
Low Interest in Wine and Cuisine Canadians
High Interest in Wine and Cuisine Canadians
High Interest in Wine and Cuisine Americans
Low Interest in Wine and Cuisine Americans
Moderate Interest in Wine and Cuisine Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->

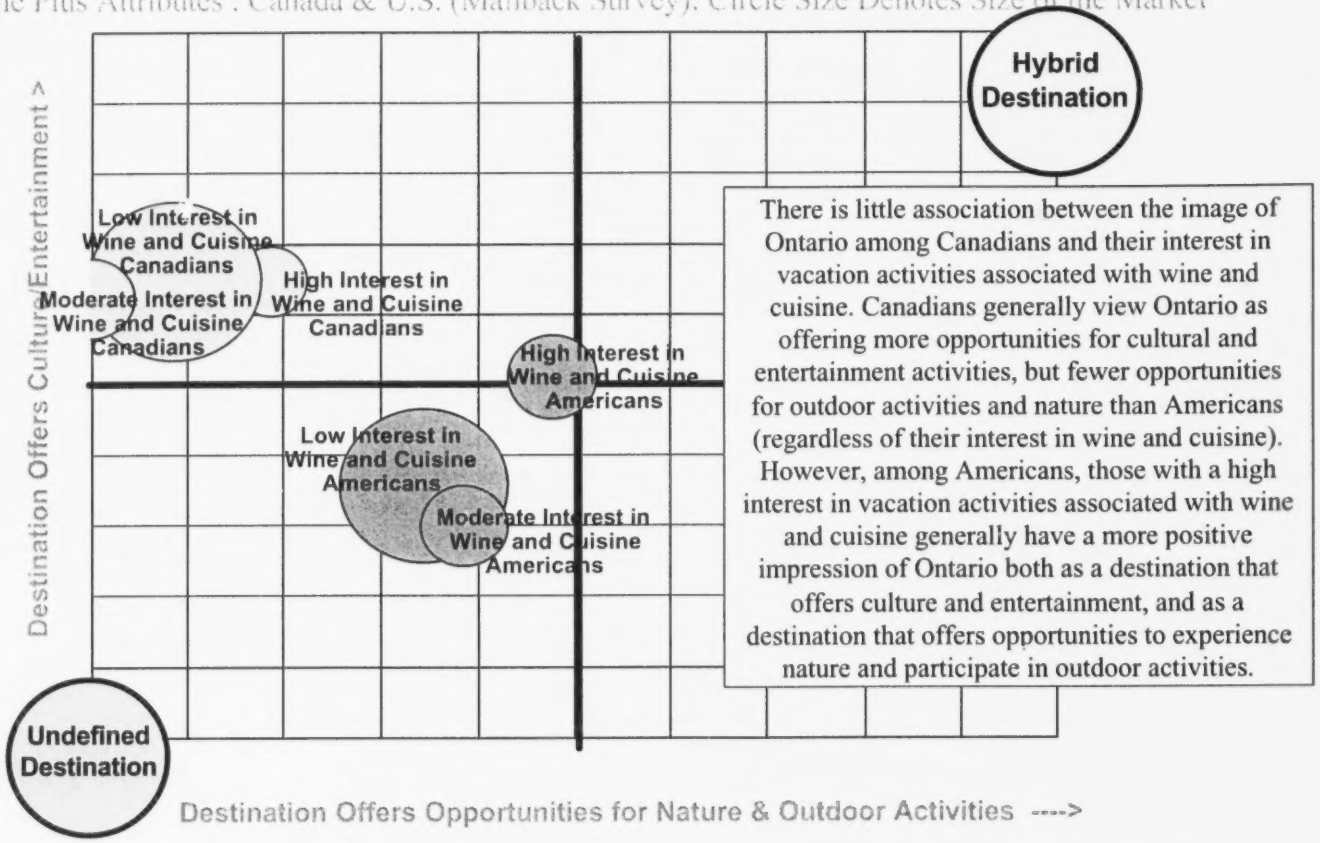
There is little association between the image of Canada among Canadians and their interest in vacation activities associated with wine and cuisine. Canadians generally view Canada as offering more opportunities for cultural and entertainment activities than Americans (regardless of their interest in wine and cuisine). However, among Americans, those with a high interest in vacation activities associated with wine and cuisine generally have a more positive impression of Canada as a destination that offers cultural and entertainment activities, and opportunities to experience nature and participate in outdoor activities. Those with a moderate interest in wine and cuisine perceive Canada as offering more opportunities for outdoor activities and nature, but not as a destination which offers culture and entertainment.

Canada and United States

Ontario Vacation Imagery

By Interest in Wine and Cuisine

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes : Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market

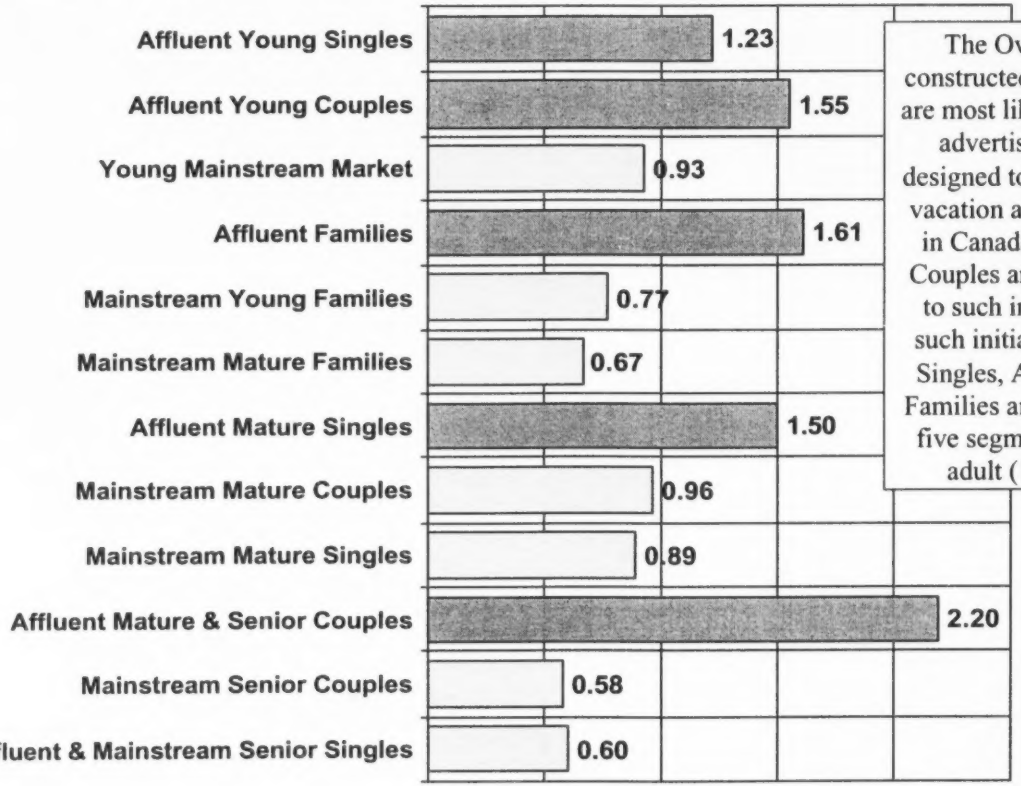

Hybrid Destination
Low Interest in Wine and Cuisine Canadians
Moderate Interest in Wine and Cuisine Canadians
High Interest in Wine and Cuisine Canadians
High Interest in Wine and Cuisine Americans
Low Interest in Wine and Cuisine Americans
Moderate Interest in Wine and Cuisine Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->
There is little association between the image of Ontario among Canadians and their interest in vacation activities associated with wine and cuisine. Canadians generally view Ontario as offering more opportunities for cultural and entertainment activities, but fewer opportunities for outdoor activities and nature than Americans (regardless of their interest in wine and cuisine). However, among Americans, those with a high interest in vacation activities associated with wine and cuisine generally have a more positive impression of Ontario both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities.

Overall Market Potential

Interest in Wine and Cuisine:Canada

Interest in Wine and Cuisine By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index is constructed to identify those segments which are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote wine and cuisine related vacation activities. This Index indicates that in Canada the Affluent Mature and Senior Couples are the most likely to be responsive to such initiatives. Secondary markets for such initiatives include the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles. These five segments represent 24.5 % of the total adult (18 plus) population in Canada.

Technical Note

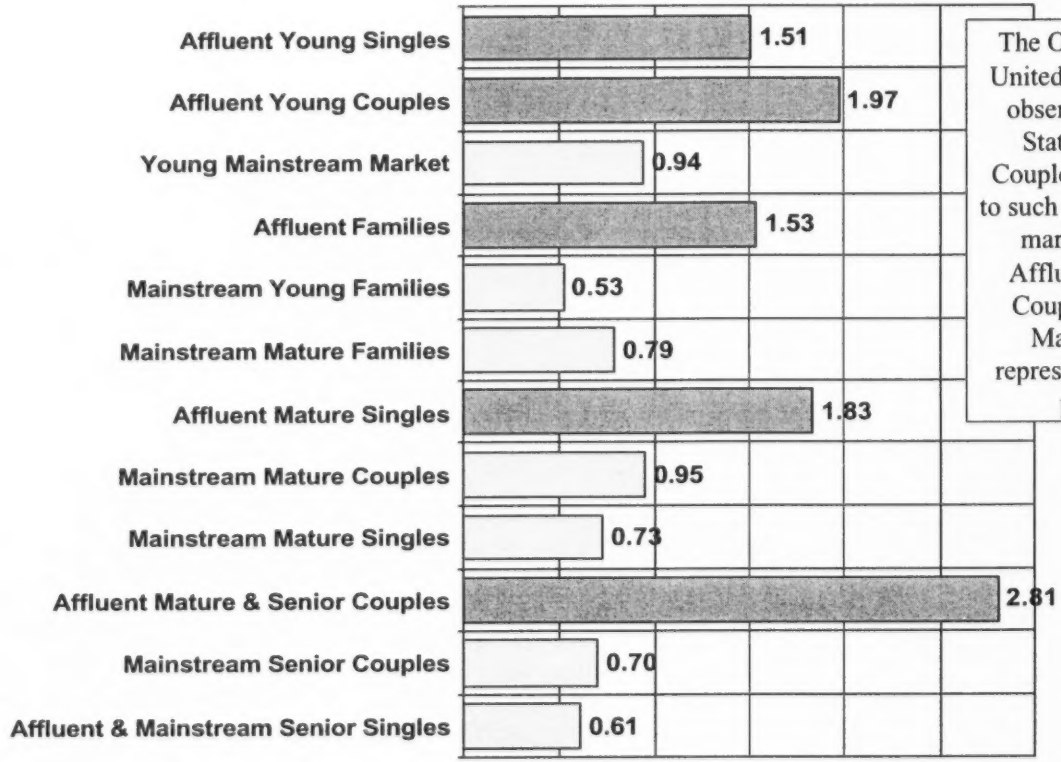
The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in wine and cuisine related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized so that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Wine and Cuisine:United States

Interest in Wine and Cuisine By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Traveled in Last 2 Years or Intends to Travel in Next 2 Years



The Overall Market Potential Index for the United States shows the same pattern as that observed for Canada. Thus, in the United States, the Affluent Mature and Senior Couples are the most likely to be responsive to such initiatives. As with Canada, secondary markets for such initiatives include the Affluent Young Singles, Affluent Young Couples, Affluent Families and Affluent Mature Singles. These five segments represent 27.3 % of the total adult (18 plus) population in the United States.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in wine and cuisine related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

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